UNITED STATES DISTRICT COURT
FOR THE NORTHERN DISTRICT OF OHIO
EASTERN DIVISION

IN RE: NATIONAL	)	
PRESCRIPTION	)	MDL No. 2804
OPIATE LITIGATION	)	
______________________	)	Case No.
	)	1:17-MD-2804
	)	
THIS DOCUMENT RELATES	)	Hon. Dan A.
TO: Case Track 8	)	Polster

FRIDAY, OCTOBER 7, 2022

HIGHLY CONFIDENTIAL - SUBJECT TO FURTHER
CONFIDENTIALITY REVIEW

- - -

Remote videotaped deposition of 30(b)(6) Publix Super Markets, Inc., designee Chris Hewell, held at the location of the witness in Lakeland, Florida, commencing at 10:04 a.m. Eastern Time, on the above date, before Carrie A. Campbell, Registered Diplomate Reporter, Certified Realtime Reporter, Illinois, California & Texas Certified Shorthand Reporter, Missouri, Kansas, Louisiana & New Jersey Certified Court Reporter.

- - -

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877.370.DEPS
deps@golkow.com

Q. And also known as ERX?
A. Some people refer to it as ERX.
Q. Okay. And how long has that dispensing system been in place with the Publix pharmacies?
MS. WHITE: Object to form.
THE WITNESS: Since prior to 2010.
QUESTIONS BY MS. CONROY:
Q. And what about for Cobb County; do you know?
A. It would have been that similar time frame. I don't specifically know when those pharmacies were converted to EnterpriseRx.
Q. Okay.
A. It was somewhere in that time frame, 2010 time frame.
Q. Okay. Now, when we have -- when we have a prescription that has been scanned and it is in the dispensing system, who can see that electronic data?
A. The pharmacy staff are able to view that -- that information.
Q. Okay. Can the pharmacy

CERTIFICATE

I, CARRIE A. CAMPBELL, Registered Diplomate Reporter, Certified Realtime Reporter and Certified Shorthand Reporter, do hereby certify that prior to the commencement of the examination, Chris Hewell, was duly sworn by me to testify to the truth, the whole truth and nothing but the truth.

I DO FURTHER CERTIFY that the foregoing is a verbatim transcript of the testimony as taken stenographically by and before me at the time, place and on the date hereinbefore set forth, to the best of my ability.

I DO FURTHER CERTIFY that I am neither a relative nor employee nor attorney nor counsel of any of the parties to this action, and that I am neither a relative nor employee of such attorney or counsel, and that I am not financially interested in the action.

Carrie A. Campbell

CARRIE A. CAMPBELL,
NCRA Registered Diplomate Reporter
Certified Realtime Reporter
California Certified Shorthand Reporter #13921
Missouri Certified Court Reporter #859
Illinois Certified Shorthand Reporter #084-004229
Texas Certified Shorthand Reporter #9328
Kansas Certified Court Reporter #1715
New Jersey Certified Court Reporter #30XI00242600
Louisiana Certified Court Reporter #2021012
Notary Public

P-PUB-0021

Publix 30(b)(6) Hewell Exhibit
28
9/30/22 Carrie Campbell, RDR
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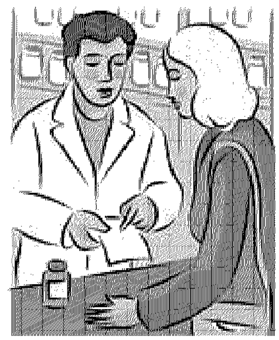
Pharmacy Operations

Pharmacist I / New Hire Graduate Intern Training
Student Workbook



Publix®

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About This Document

Document owner(s):	Pharmacy Operations Recruiting, Training and Development
File name:	Pharmacist I / New Hire Graduate Intern Training Student Workbook

If you have any questions or comments about this document or would like to be added to the distribution list for this document, please contact the document owner.

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Introduction

Welcome!

Welcome to Publix where you will find that working is a pleasure! You have accepted a very important role in our Pharmacy Department where you will be responsible (or will soon be responsible if you are a graduate intern) for the daily operation of the pharmacy and the delivery of premier customer service.

About this Student Workbook

You have received this Student Workbook to assist you through your training. It contains key take-aways and summaries for each course that you complete. This is yours to keep, so take notes and write in it as much as you want.

Program name Pharmacist I / New Hire Graduate Intern Training

Student -newly hired pharmacists (into any pharmacist job class)
-newly hired graduate interns

Facilitator -staff at training location as assigned
-Pharmacy Supervisor

Completion Completion will be recorded in Learning by you at the end of the training program.

Schedule Training length is 2 weeks, 8 total days. (Four 8 hour days the first week and four 10 hour days the second week.) The day of the week is flexible according to pharmacy needs.

Content Content is laid out by day. At times you may move past the current day or not finish the current day's topics. This is fine, you can complete the content on the next scheduled day. However, please complete the content in order of the day-to-day schedule.

Day	Length	Module Name	Facilitator
1	8 hours	Publix Pharmacy Practice	Training location RPh
		HIPAA Compliance	
		Physical & System Workflow I	
		Operating the Cash Register	
2	8 hours	Physical & System Workflow II	Training location RPh
		MethGuard Training	
3	8 hours	Physical & System Workflow III	Training location Rph
		Compliance Courses	
4	8 hours	References & Resources	Training location RPh
		Publix Pharmacy	Pharmacy Supervisor
5	10 hours	Exception Queue Management	Training location RPh
6	10 hours	Other Tools & Functions	Training location RPh
7	10 hours	Inventory Management	Training location RPh
8	10 hours	Overlap day at home store w/partner (Non-floater pharmacists and graduate interns only. Floaters remain at training store.)	Home store partner

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Module P1:
Publix Pharmacy Practice

Module Description:
department overview, service expectations and tools, daily tasks, workflow overview and patient safety

Course Name	Course Description	Type	Facilitator
Department overview	pharmacy department layout, security within our pharmacy	ILT	Training Location RPh
Service Expectations and Tools	proper use of the phone and intercom, customer service techniques	ILT	
Day-to-Day tasks	opening & closing steps, daily tasks, other tasks, important sources of information	ILT	
PPCQIP	workflow overview and standard safety practices	ILT	

Legend
ILT – Instructor-led training

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name Department overview

Course Description pharmacy department layout, security within our pharmacy

Department layout

Each pharmacy is split up into three main areas:

Medication Stock Area (behind the Counter)	Dispensing Area (the Counter)	Sales Floor
• Alphabetized drug shelves • Fast movers • Refrigerator stock • CII cabinet/drawer • Storage cabinet • PSE (Pseudoephedrine) products • Diabetic supplies • Compounding or preparation area	• Pharmacy system workstations • Image scanner • Thermal printer(s) • Laser printer • Counting trays • Vial stock/supply drawers • Will-call area • Shredder	• Customer Drop off • Customer Pick up • Monthly plan-o-gram product displays and related signage • OTC aisle • Blood pressure machine • Required signs (state & Federal) • Advertising signs • Storage cabinet in back room

Below is a list of approved items that can be kept on the prescription filling counter. This is a list of items beyond Publix hardware, such as your computers, scanners, printers, etc.

- baskets (when not in use, store below counter)
- calculator(s)
- counting trays and spatulas (extras not being used should be in drawer)
- hardcopies by schedule in small baskets (store in drawer if possible)
- lid opener/remover
- mouse pads
- patient info forms (blank)
- pen/pencil holder w/ Sharpie & scissors
- Rx bags – large, medium, small
- Rx pad(s)
- 70% Isopropyl Alcohol (for cleaning counting trays/thermal printers)
- scale (if used for counting)
- stapler
- staging bin – Rx's to be put in will call
- stamps used in prescription filling
- store phone extension list
- phone/headset

Pharmacy Security

- lock box process is in Ch. 4 of the Pharmacy Reference and Procedures Guide (for reference once you get to your work location, or for graduate interns once you become a licensed pharmacist)
- pharmacy must be locked outside of business hours
- no purses or bags in pharmacy

Note: This protects patient's PHI, as well as Publix's inventory.

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name Service Expectations and Tools

Course Description proper use of the phone and intercom, customer service techniques

Pharmacists R.O.C.! = Pharmacists Recognize Our Customers!

- See the Pharmacists ROC! sticker as a reminder each day
- Review the Pharmacist ROC! Information in Ch. 3 of the Pharmacy R&P Guide
- These are standard practices that help us recognize customers throughout the day.

Service Expectation	Description	Examples of when to use
The 10 ft rule	Speak to and smile at everyone within 10 feet of you.	• customers passing by the pharmacy, even if they're not stopping for assistance • customers waiting next in line at the pharmacy counter • customers in the OTC section appearing to need help
The 10 sec rule	Greet customers within the first 10 seconds of their arrival in your department.	• be sure to assist a customer right away when they approach the pharmacy counter
The **CALM** approach	1. Stay **C**ool. 2. **A**pologize for the problem. 3. **L**isten with empathy. 4. **M**ake it right.	• customer upset about prescription filling wait time • problems with third party insurance billing

Using the Telephone

- Answer the phone within 3 rings.
- Greet the caller and give them your name and title (e.g. "Publix Pharmacy this is Jane, Pharmacist, how can I help you?")
- Speak with a friendly and enthusiastic voice.
- Use courteous and professional tone and word choice.

Using the Intercom

- Select an available intercom line.
- Speak clearly in a natural tone without shouting.
- Use a positive tone of voice.
- Keep the announcement brief.
- Repeat the complete announcement.
- Press the Release button before returning the handset to the cradle.

Patient Privacy

- Always be aware of those who are within earshot of you when discussing a patient's PHI on the telephone or at the pharmacy counter. Slide down the counter to have a conversation with a patient if your pharmacy design permits. Also, keep your voice low when conducting such conversations.
- Also a patient's PHI should never be discussed with other associates except when associated with the patient's treatment, billing/payment, or other healthcare-related operations.

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name Day-to-Day Tasks

Course Description opening & closing steps, daily/weekly tasks, other tasks, important sources of information

Opening & Closing

- Chapter 4 of the R&P has information on
    - Accessing the Lock Box
    - Opening the Pharmacy
    - Closing the Pharmacy

Daily/Weekly Tasks and Other Tasks

- The Pharmacy Task Checklist identifies important daily and weekly tasks. It's maintained on the Pharmacy page of Publix Connection in the Pharmacy Operations section and should be posted in your pharmacy.
- Chapter 4 of the R&P has information on Daily, Weekly, Monthly, Quarterly and Annual procedures.

Important Sources of Information

- Current information and assignments in the **Pharmacy Weekly Memo** – every Wednesday
- **Quarterly Newsletter** contains less critical information, yet helpful for your everyday needs
- **What's New** is a section on the Pharmacy page that provides you with announcements including upcoming CE programs and other company information
- **Patient Safety Newsletter** – quarterly newsletter providing you with important safety reminders

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name PPCQIP

Course Description QRE prevention, basic workflow, safety practices

How is QRE defined at Publix?
Definitions and examples of Level 1 QRE & Level 2 QREs

Definition	Examples
Level 1 = any departure from the appropriate dispensing of a prescribed medication that is not corrected prior to the delivery of the medication to the patient. This includes, but is not limited to, wrong patient, wrong drug, wrong strength and wrong direction errors.	• patient receives wrong drug in vial • patient receives another patient's prescription • patient receives wrong dosage, strength or form of a drug • patient receives product not re-constituted properly • patient receives substitute that is not therapeutically equivalent • patient receives drug, but DUR was bypassed • patient receives a medication with an easy open cap when not requested
A Level 2 = any departure from the appropriate dispensing of a prescribed medication that is corrected prior to the delivery of the medication to the patient, or is delivered to the patient, but does not fall under the Level 1 definition.	an error found in the pharmacy management system requiring the pharmacy associate to decline the prescription to make a correction prior to delivery of the medication to the patient an error when bagging the prescription that is caught before delivery to the patient patient receives prescription with the wrong prescriber name on the vial label patient receives prescription with incorrect pharmacy information on the vial label (e.g., phone #, address)

Highlights about the PPCQIP
Review Ch. 9 in the R&P for the details of the program. Here's some highlights:

- This is all about improvement!
- When we identify and analyze QREs, we are looking for improvements to our operations in order to reduce the risk of future QREs.
- Level 1 QREs should be documented and analyzed.
- Keep your discussions with pharmacy staff process-focused and avoid blaming or pointing fingers. Process improvements will help to reduce errors in the future.

Patient Safety Committee & Newsletters
Patient safety is our foundational, underlying goal. In support of that goal, we have a Patient Safety Committee that meets quarterly to evaluate QRE activity and trends to identify and implement company-wide improvements to patient safety standards. The team is made up of a Pharmacy Technician, Pharmacist, Pharmacy Supervisor, Pharmacy Operations Manager, Risk Management and other Pharmacy Operations associates.

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Part of the team's work includes publication of the quarterly patient safety newsletter – Patient Safety Starts with You! Each newsletter is published in the weekly memo and can be found on the Pharmacy page of Publix Connection in the Pharmacy Operations section.

Quality Related Event (QRE) Prevention Techniques

- Prevention techniques are covered in the first half of Ch. 9 of the R&P
- Standards are expected to be maintained in your pharmacy
  - Environmental and Staffing Safety Practices
  - Drug Order and Drug Safety Practices
    - Special Attention Drugs
  - Drug Storage and Handling Safety Practices
  - Patient Information and Patient Communication Safety Practices

QRE Handling

Chapter 9 of the R&P identifies all steps for appropriately handling a discovered QRE. Know the process is there to reference when needed. Here's some highlights:

- The *Initial Report & Analysis Form* used to document Level 1 QREs (Form located on the Pharmacy page in the Pharmacy Operations section*)*.
  - used to gather information and
  - evaluate QREs for identification of process improvements or prevention techniques.
- When handling a Level 1 QRE, the Pharmacist must follow these main steps:
  - contact any patients involved and potentially each patient's prescriber depending on the situation
  - notify the Pharmacy Supervisor and Risk Management (within a 24-hour period), and
  - possibly contact the Privacy Officer if PHI was disclosed.
- When communicating with patients about a potential QRE, consider these key tips (covered in much more detail in the Patient Safety CBT):
  - maintain eye contact and listen intently allowing the patient to share concerns
  - acknowledge the patient's concerns with something like, "I can see why you are concerned." and
  - assure the patient you'll be checking into the details of what happened.

Associate Counseling policies

- The PPCQIP program encourages self-reporting and quality improvement based on the reported information; however, there is a point at which counseling may be necessary.
- Be familiar with the counseling policies at the end of Ch. 9 of the R&P:
  - Pharmacist Counseling policy
  - RTP-Wrong Patient Counseling (for any pharmacy staff)
  - Failure to report a dispensed QRE

Summary

- **Safety starts with YOU!**
- A licensed pharmacist is responsible for
  - keeping patients' safe
  - identifying opportunities for improvement
  - implementing and maintaining a high standard of patient safety practices

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Module P2:
HIPAA Compliance

Module Description:
regulations and the importance of compliance to these regulations

Course Name	Course Description	Type	Length	Facilitator
HIPAA	HIPAA Privacy and Security regulations impacting retail pharmacies plus references to our policies	CBT	1 hr	Learning

How to Access: Log into Learning through Passport on your store's training workstation. Locate the Compliance CBT listed above on your To Do list and click the Start button.

Note: The course listed above must be taken before moving on to any other courses.

Legend
CBT – Computer based training

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Module P3:
Physical & System Workflow I

Module Description:
Complete overview of workflow and the Reception process

Course Name	Course Description	Type	Facilitator
Physical and System Workflow Overview	workflow from the time a Rx is dropped off to picked up and the basic processes involved along the way	ILT	Training Location RPh
Reception & Related Processes	a detail dive into reception processes including standard procedures and safety protocols	ILT	

Legend
ILT – Instructor-led training

Course Name Physical & System Workflow Overview

Course Description workflow from the time a Rx is dropped off to picked up and the basic processes involved along the way

Workflow summary

- Each workstation in the pharmacy is set up in a certain spot and certain functions are performed at each workstation to ensure prescriptions are filled efficiently while meeting quality, safety, and privacy standards.
- The process of filling a prescription is referred to as *workflow*. Workflow includes the physical workflow (workstation placement), as well as the flow of the data in EnterpriseRx.

Workflow details

Workflow	Basic functions
Reception	Reception is the "Drop Off" area for your patients. • Greet patient • Identify new patient information • Update existing patient information, if necessary • Accept prescription requests from patients • Document required information on prescription hard copy • Scan hard copy prescriptions into the pharmacy system • Identify date and time prescription to be ready for patient (Promise Date & Time)
Data Entry	• Enter prescription information into the pharmacy system • Ensure insurance is selected, if applicable
DUR/Pre-Verification (PV1)	• Pharmacist reviews and verifies the data entry • Pharmacist performs drug utilization review
Product Dispensing	• Print label for the vial • Verify label against the system for patient and drug prescribed • Pull product off the shelf • Ensure proper product selected by using accuracy scan • Select correct vial and cap • Count and label vial
Final Verification (PV2)	• Pharmacist reviews and verifies the prescription product is correct • Pharmacist packages the prescription in a bag with patient receipt and education
Release to Patient	Release to Patient is the "Pick up" area for your patients. • Ask patient for address to verify who they are at pickup • Verify patient information against bagged prescription information • Pharmacist counsels patient and releases prescription to patient • Ring up sale

Workflow Safety Tips

- Each workflow step used to fill a prescription includes standard procedures and safety practices that must be followed.
    - See the Pharmacy System Workflow and Procedural Safety Practices section of the Pharmacy R&P Guide, Chapter 9.
    - See the Workflow quick reference tip sheet on the Pharmacy page of Publix Connection in the Pharmacy Operations section.

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name Publix Pharmacy – Reception & Related Processes

Course Description a detail dive into reception processes including standard procedures and safety protocols

Overview

- Accepting new prescription orders from our customers, *Reception,* provides us with many customer service and record keeping opportunities.
- This is accomplished while being respectful of the customer's time and having prescriptions ready when promised.
- Read the Reception Basics document on the Pharmacy page of Publix Connection which covers:

  the standardized process and procedures for accepting prescription order requests, and
  ways to inform our customers of our services in a professional and caring interaction.

Review of Publix's Patient Search Protocol

Steps - Patient Search Protocol

1. *Primary phone and Search Corporate*, if no results then
2. *4+2+DOB & Search Corporate*, if no results then
3. *Full last name, DOB & Search Corporate*, if no results then
4. add a new patient profile.
   *if there are many similar names, validate by date of birth or home address

Why important?

- for patient safety (narrows list of patients from the centralized database from which you must select)
- system performance (if search with too few letters or numbers, will slow the system down tremendously)

Reminders to follow the protocol

Reminders to follow this protocol are in the pharmacy

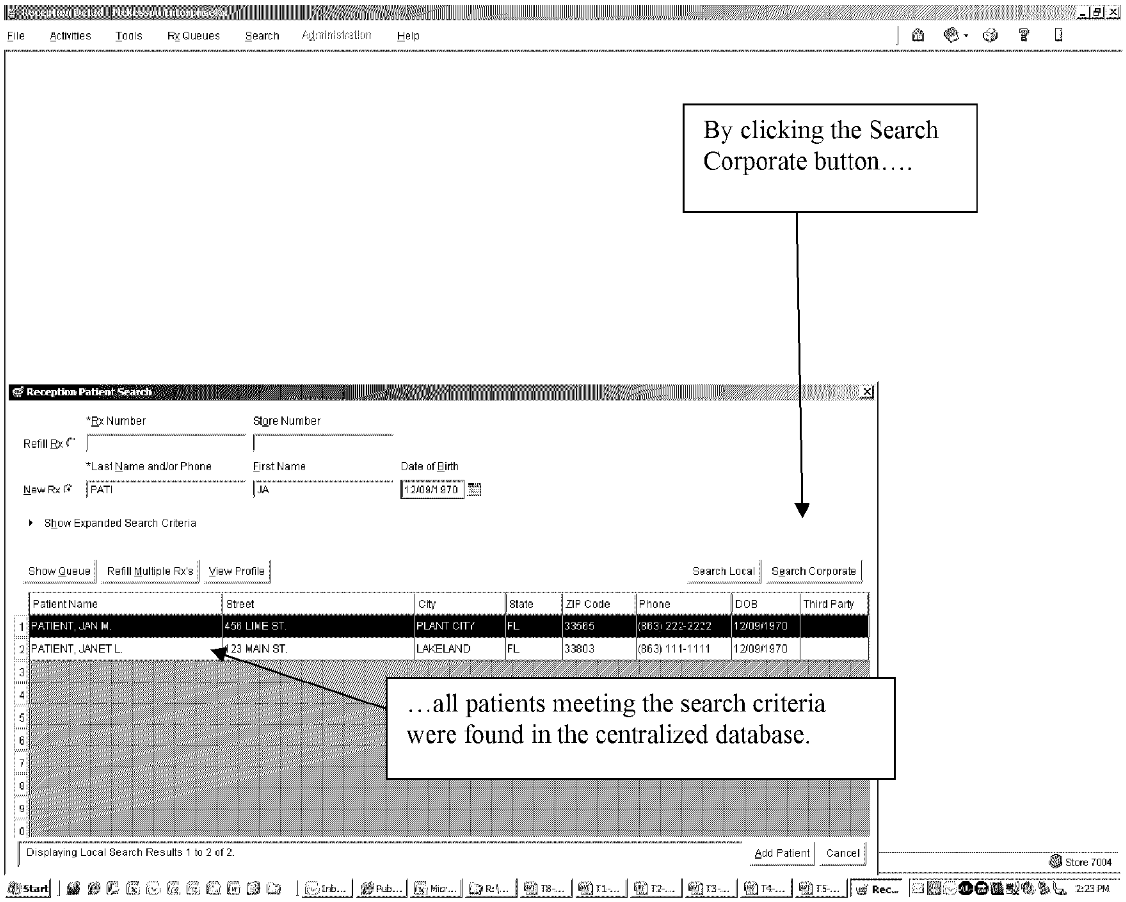
- Reception Basics sticker on the image scanner

Example of Patient Search Protocol

The patient you are looking for is Jan Patient, DOB 12/9/1970.

1. Say you first perform a *Primary Phone & Search Corporate* and there are no results.
2. Then you perform a *4+2+DOB & Search Corporate* search and find Janet L. Patient, DOB 12/9/1970 and Jan Patient, DOB 12/9/1970. <u>You ask for her address</u> and she says it's in Plant City, FL. You have successfully found the correct patient ensuring patient safety and proper billing.

3. Next you would go to the patient profile and update the primary phone number for the patient to ensure that she'll come up with the *Primary Phone & Search Corporate* search next time.



Note: In this case, the store was located in Lakeland. If the Search Corporate button had not been selected, the Plant City profile would not have been presented. (Only the Lakeland profile for Janet L. Patient would have been presented.) This means you could have selected the wrong patient by simply assuming that Janet goes by Jan when in reality, it was a totally different patient. **Always use the Search Corporate button to ensure you are finding the right patient and to help avoid (and even identify) duplicate patient profiles in the system.**

<u>Adding a patient to the system</u>

If you perform standard search protocol and can't find the patient, then you can add a patient. You can add a patient from Reception, as well as from the Search menu in the pharmacy system.

Prescription documentation and retention

Documentation

- State and Federal regulations require that certain information be documented on prescription hard copies or in our pharmacy system relative to each prescription.
- Publix has contracts with third-party insurance plans that identify requirements for prescriptions in order for Publix to receive payment from the insurance plan.
- Review this information carefully in Reception Basics document referenced above.
- Also keep up with your state regulations.

Note: Having a scanned image of the hard copy and the ability to add Prescription Notes in our pharmacy system helps you ensure the proper documentation on each prescription.

Hard Copy tagging requirements

- *Hard Copy tag* = label containing information required by state law to be on the back side of a prescription hard copy
- Hard Copy tagging isn't done at Reception, but it impacts how a hard copy moves through workflow.

State	Hard Copy tag requirements	Printing PPI for Rx Files Required?
FL	Only hard copy controlled substance prescriptions (CII – CV) are Hard Copy tagged.	No
AL, GA, NC, SC, TN, VA	All hard copy prescriptions are Hard Copy tagged.	No

Filing

State	Filing requirements
FL	• CIIs and CIII-CVs are filed separately in sequential Rx# order by 100. The Hard Copy tag is used to put the hard copies in sequential order. • Legends and OTCs are filed together by day.
AL, GA, NC, SC, TN, VA	CIIs, CIII-CVs, Legends, OTCs are filed separately in sequential Rx# order by 100. The Hard Copy tag is used to put the hard copies in sequential order.

Retention

- file and maintain according to Publix's document retention guidelines (on Publix Connection *@ Resources > Records and Information Management >Retail records management > Pharmacy Retention Schedule*)
- Publix retention guidelines comply with state, DEA and CMS requirements

Promise Date & Time (PDT)

- accurate PDT = associates working on the right prescriptions at the right time to meet the patient's expectation
  - key to management of the workload in the pharmacy
  - key to Workload Balancing and Central Pharmacy – covered in Module 12
- inaccurate PDT = inefficiency, chaos, & unhappy customers

Workflow Safety Tips

- Below is a summary of safety tips for Reception
  - ensure patient's name, DOB, and phone # written clearly on the hard copy
  - ensure drug name, strength and form written clearly on the hard copy
  - ensure all information on the hard copy is legible once scanned into the system
  - use standard search protocol to select the right patient in the system
    1. First search - *Primary phone & press Enter*, if no results
    2. Then search - *4+2+DOB & Search Corporate*, if no results
    3. Then search - *Full last name, DOB & Search Corporate* if no results, then
    4. Add patient to system
  - ask patient for updated medical, allergy, DUR Rx and OTC information
  - address any potential duplicate patient profiles (perform merges with caution to ensure allergies, medical conditions, and DUR Rx information remains on the merged profile

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Module P4:
Operating the Cash Register

Module Description:
How to use the cash register

Course Name	Course Description	Type	Facilitator
Cashier CBT	learn to use the register	CBT	Learning

Instructions

- Log into Learning through Passport on your store's training workstation. Locate the Cashier CBT listed on your To Do list and click the Start button.
- After completing the CBT your Training Location Pharmacist will train you on running the pharmacy register and have you practice this task.

Legend
CBT – Computer based training

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Module P5:
Physical & System Workflow II

Module Description:
Complete overview of Data Entry, DUR/PV1, Product Dispensing & Final Verification processes

Course Name	Course Description	Type	Facilitator
Data Entry & Related Processes	a detail dive into each workflow process including standard procedures and safety protocols	ILT	Training Location RPh
DUR/PV1 & Related Processes – this section includes the *Proper Handling of DURs* video in Learning		ILT	
Product Dispensing & Related Processes		ILT	
Final Verification & Related Processes		ILT	

Legend
ILT – Instructor-led training

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name Publix Pharmacy – Data Entry & Related Processes

Course Description a detail dive into data entry processes including standard procedures and safety protocols

Overview

Entering information from the prescription hard copy creates an electronic record enabling us to:

- electronically bill the prescription to insurance
- perform drug utilization reviews
- print vial wraps, bag tags, hard copy tags, patient receipt and education, MedGuides, etc.
- perform accuracy checks at Product Dispensing
- adjust inventory balances for amount of product used for prescriptions filled, and
- meet many other business and regulatory requirements.

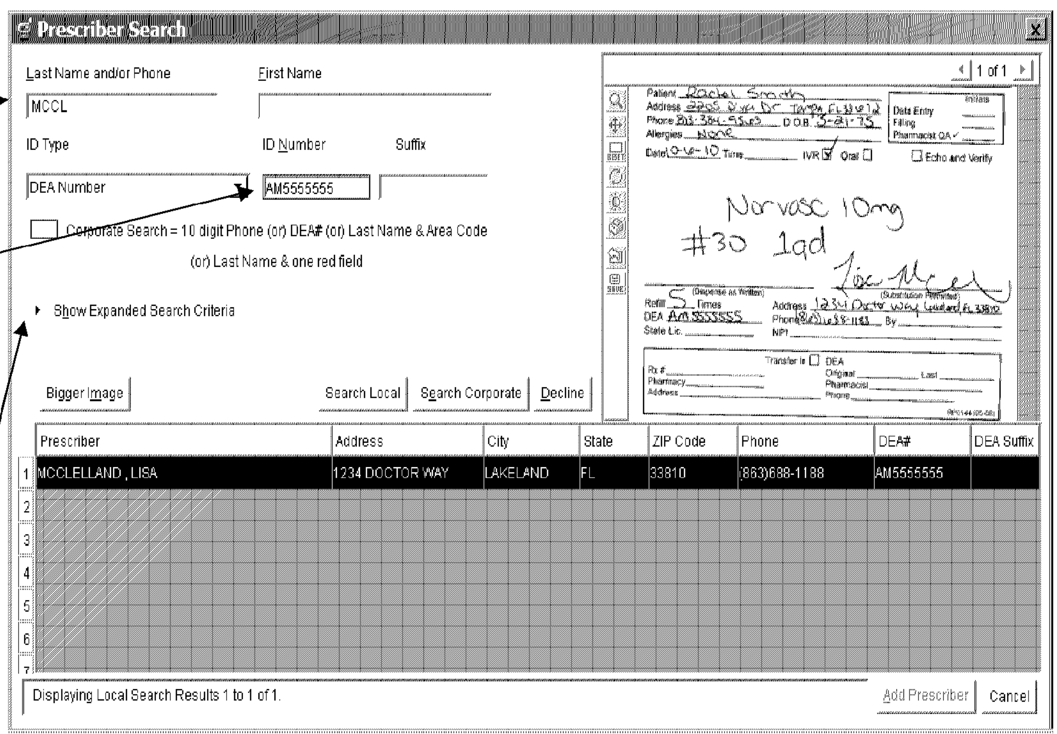
Prescriber Search Protocol

Steps - Prescriber Search Protocol

1. Perform a Local search (only requires the last name to perform the search), if no results then
2. Perform a Corporate search using the DEA#, if no results then
3. Add a new prescriber profile.

1. For *local search*, enter 4 letters of last name & hit Enter
2. For *corporate search* enter a DEA # (or other red-outlined field & hit **Search Corporate**.

You can select **Show Expanded Search Criteria** to search by the prescriber's address.



Potential duplicates
Search results may look like multiple profiles for the same prescriber. This could be

- separate line items for the different addresses at which the prescriber works, or
- multiple profiles for the same prescriber have been accidentally entered into the centralized database.

If you find that there are multiple profiles for the same prescriber, contact the Pharmacy Support Desk for assistance.

Why important?

- regulatory compliance
- billing accuracy
- prescriber is noted on the patient's vial wrap

Adding a prescriber profile
Prescriber profiles can be added from workflow or directly using the Search menu.

Drug Search Protocol

Steps - Drug Search Protocol

1. first 5 letters of drug name and
2. strength.

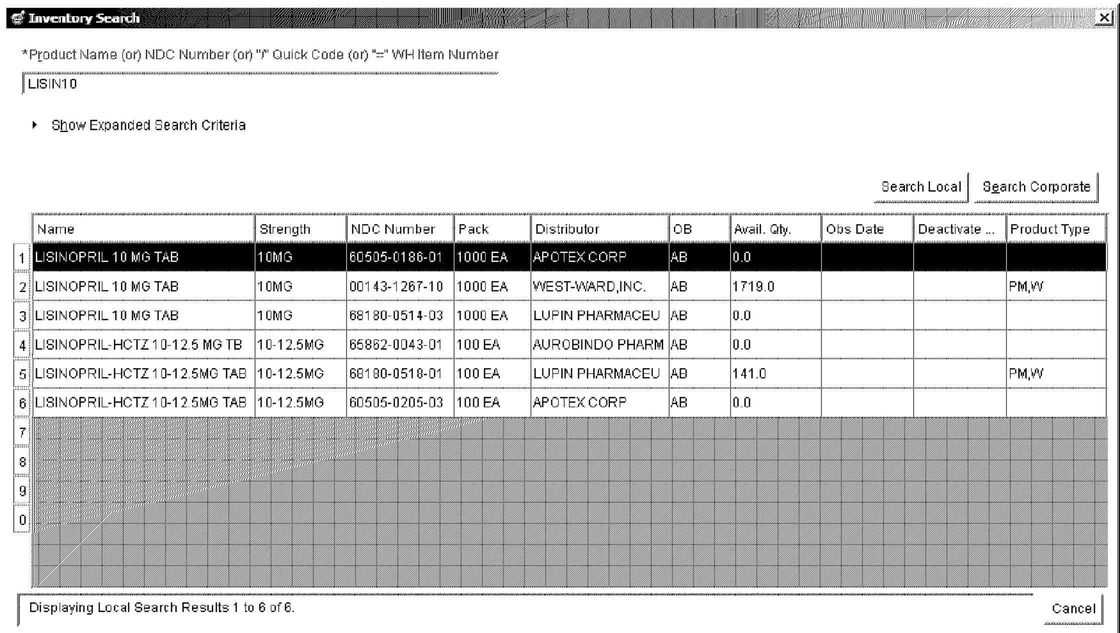
For example, if searching for Lisinopril 10 mg enter **LISIN10**. If you follow the protocol and the drug doesn't come up, a Corporate search may need to be performed. (See course on Product and Inventory Profiles in Module P7.)

Why important?

- for patient safety while in workflow (narrows list of products to the drug name & strength to minimize risk of selection error)
- system performance (if searching with too few letters or numbers, will slow the system down tremendously, especially if doing a Corporate search)

**Pharmacist I/New Hire Graduate Intern Training
Required Courses**

Example of Drug Search Protocol
Searching by LISIN10 narrows your search minimizing your risk of selecting the wrong drug.


Inventory Search

*Product Name (or) NDC Number (or) "/" Quick Code (or) "=" WH Item Number

LISIN10

Show Expanded Search Criteria

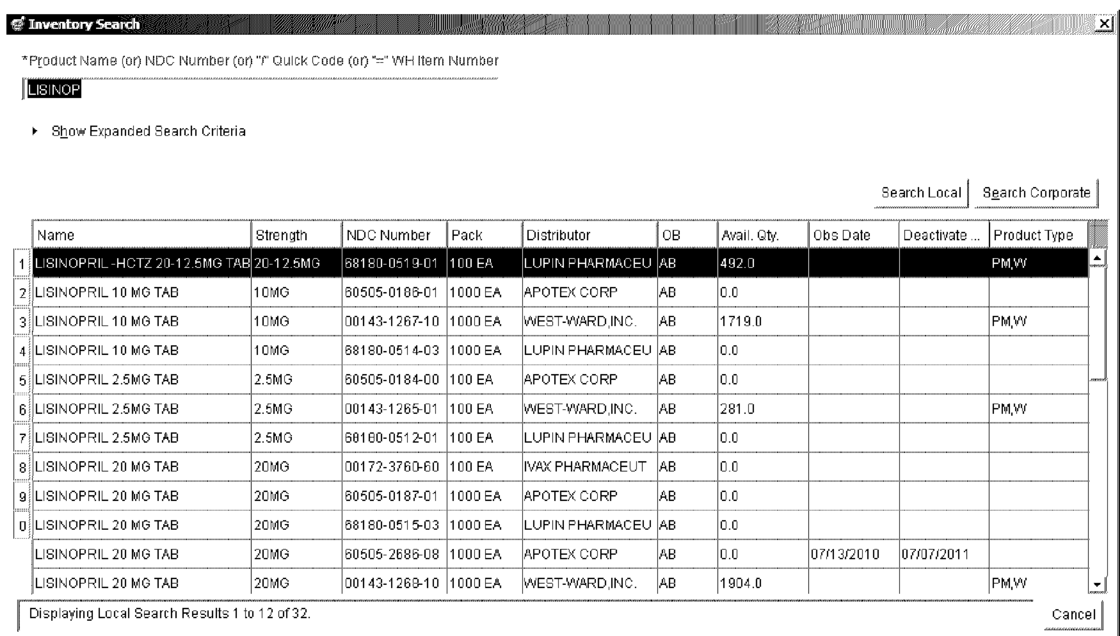
Search Local | Search Corporate

	Name	Strength	NDC Number	Pack	Distributor	OB	Avail. Qty.	Obs Date	Deactivate ...	Product Type
1	LISINOPRIL 10 MG TAB	10MG	60505-0186-01	1000 EA	APOTEX CORP	AB	0.0			
2	LISINOPRIL 10 MG TAB	10MG	00143-1267-10	1000 EA	WEST-WARD,INC.	AB	1719.0			PM,W
3	LISINOPRIL 10 MG TAB	10MG	68180-0514-03	1000 EA	LUPIN PHARMACEU	AB	0.0			
4	LISINOPRIL-HCTZ 10-12.5 MG TB	10-12.5MG	65862-0043-01	100 EA	AUROBINDO PHARM	AB	0.0			
5	LISINOPRIL-HCTZ 10-12.5MG TAB	10-12.5MG	68180-0518-01	100 EA	LUPIN PHARMACEU	AB	141.0			PM,W
6	LISINOPRIL-HCTZ 10-12.5MG TAB	10-12.5MG	60505-0205-03	100 EA	APOTEX CORP	AB	0.0			
7										
8										
9										
0										

Displaying Local Search Results 1 to 6 of 6.

Cancel

Searching by LISINOP doesn't narrow your search enough and increases chances of selecting the wrong drug.


Inventory Search

*Product Name (or) NDC Number (or) "/" Quick Code (or) "=" WH Item Number

LISINOP

Show Expanded Search Criteria

Search Local | Search Corporate

	Name	Strength	NDC Number	Pack	Distributor	OB	Avail. Qty.	Obs Date	Deactivate ...	Product Type
1	LISINOPRIL-HCTZ 20-12.5MG TAB	20-12.5MG	68180-0519-01	100 EA	LUPIN PHARMACEU	AB	492.0			PM,W
2	LISINOPRIL 10 MG TAB	10MG	60505-0186-01	1000 EA	APOTEX CORP	AB	0.0			
3	LISINOPRIL 10 MG TAB	10MG	00143-1267-10	1000 EA	WEST-WARD,INC.	AB	1719.0			PM,W
4	LISINOPRIL 10 MG TAB	10MG	68180-0514-03	1000 EA	LUPIN PHARMACEU	AB	0.0			
5	LISINOPRIL 2.5MG TAB	2.5MG	60505-0184-00	100 EA	APOTEX CORP	AB	0.0			
6	LISINOPRIL 2.5MG TAB	2.5MG	00143-1265-01	100 EA	WEST-WARD,INC.	AB	281.0			PM,W
7	LISINOPRIL 2.5MG TAB	2.5MG	68180-0512-01	100 EA	LUPIN PHARMACEU	AB	0.0			
8	LISINOPRIL 20 MG TAB	20MG	00172-3760-60	100 EA	IVAX PHARMACEUT	AB	0.0			
9	LISINOPRIL 20 MG TAB	20MG	60505-0187-01	1000 EA	APOTEX CORP	AB	0.0			
0	LISINOPRIL 20 MG TAB	20MG	68180-0515-03	1000 EA	LUPIN PHARMACEU	AB	0.0			
	LISINOPRIL 20 MG TAB	20MG	60505-2686-08	1000 EA	APOTEX CORP	AB	0.0	07/13/2010	07/07/2011	
	LISINOPRIL 20 MG TAB	20MG	00143-1268-10	1000 EA	WEST-WARD,INC.	AB	1904.0			PM,W

Displaying Local Search Results 1 to 12 of 32.

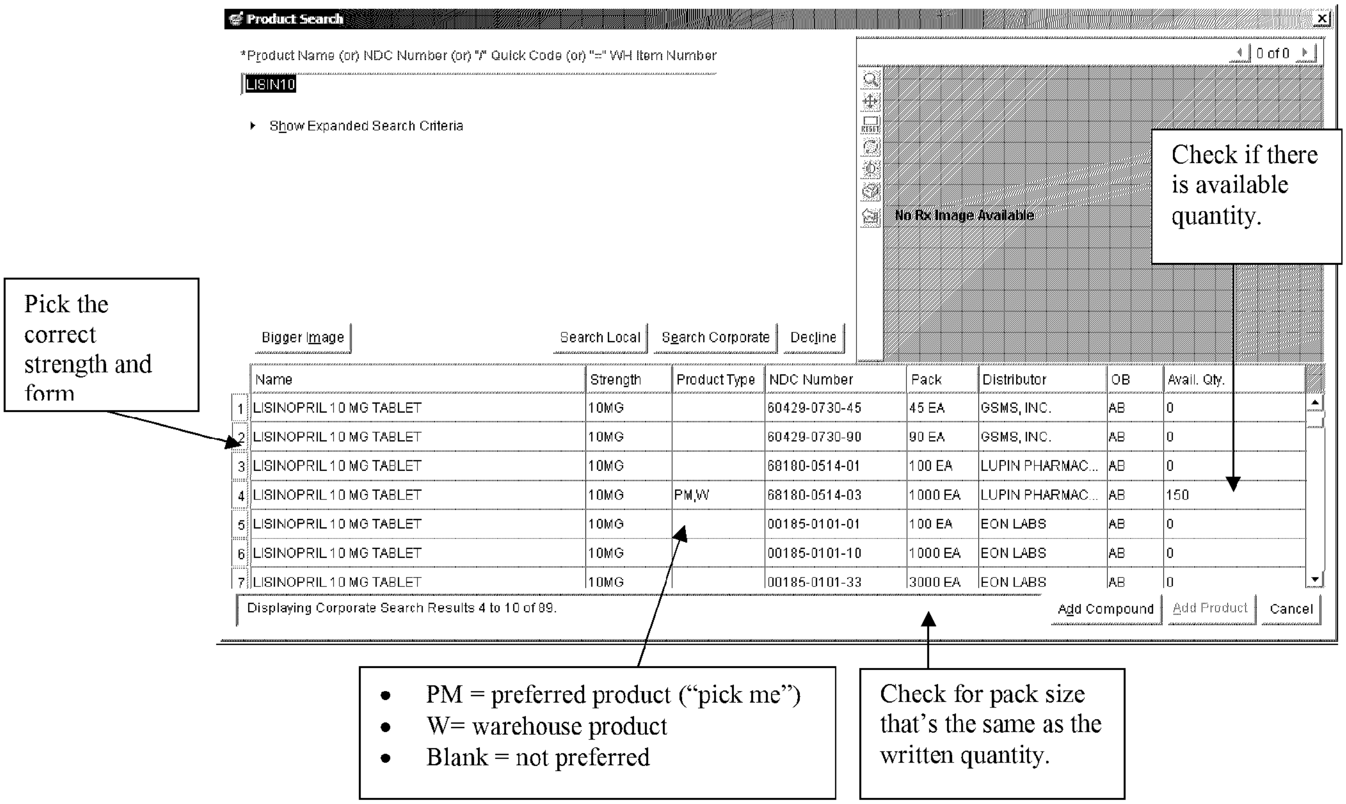
Cancel

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Drug Selection Protocol

Steps - Drug Selection Protocol

1. select correct product as written on the prescription
   - medication (generic or brand)
   - strength, and
   - dosage form
2. select product that is in stock
3. whenever possible, select Publix's preferred product (to maximize profit)
4. if your state follows the Orange Book (OB) coding system, when selecting generics, be sure to select a generic with the same OB rating as the brand

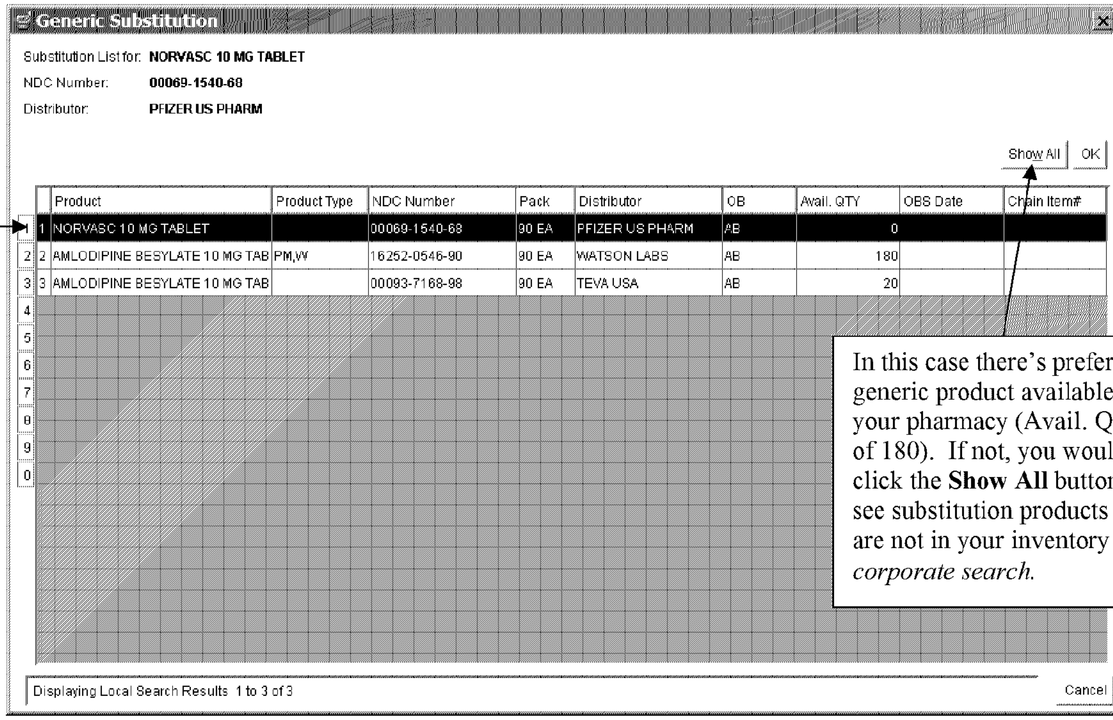


Why important?

- for patient safety
- for maximizing gross profit

Other drug selection tips

- A generic substitution screen will automatically present itself when choosing a multi-source drug.
- If there's only one NDC in inventory (product that you have ordered before) that meets the search criteria, EnterpriseRx will select that NDC. At this point to select an alternative, re-do the search and search Corporate.



Notice the brand selected is on line 1 & the generic alternatives are listed below that.

In this case there's preferred generic product available at your pharmacy (Avail. Qty of 180). If not, you would click the **Show All** button to see substitution products that are not in your inventory – *corporate search.*

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Data Entry Detail

Icon used to make corrections to data already entered.

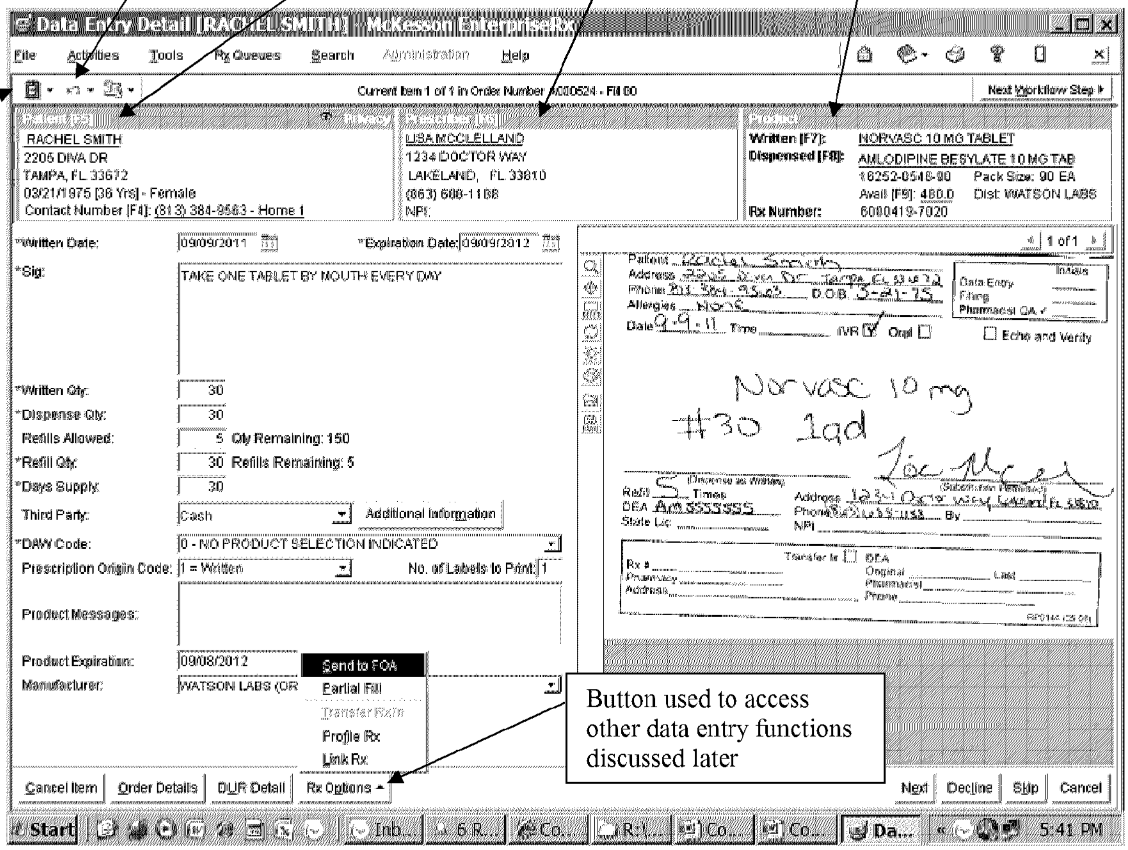
Patient as selected in Reception with hyperlink to profile.

Prescriber as selected in Data Entry with hyperlinks to profile.

Written & dispensed product as selected in Data Entry with hyperlinks to profiles.

Icon to access/ update Rx, Tx and patient notes.

Quantity section



Button used to access other data entry functions discussed later

Tips to complete Data Entry

- **Always TAB through the fields on the Data Entry screen!**
  - The TAB button moves the cursor to the next field and
  - causes the system to calculate information in certain fields (e.g., sig code conversion, quantity calculations).
- SIG Rules are located on the Pharmacy page of Publix Connection.
  - SIG Codes are used to calculate the days supply.
  - Free forming directions requires the days supply to be manually calculated.
  - Special SIG codes are included in the Product Message section on the screen.

- Quantity section
  - Refill Qty = Written Qty
    - auto-populated
    - **editing of the Refill Qty field is rare and should not be done unless absolutely necessary**
    - **if edit this field, must check the remaining calculations on the screen**
  - Days Supply
    - calculated using SIG Code and Dispensed Qty
  - Quantity Remaining
    - auto-calculated and not editable
    - = Refills Remaining x Refill Qty
  - Remaining Refills
    - auto-calculated and not editable
- Third-party selection and billing
  - DAW codes automatically populate
    - National Council on Prescription Drug Programs (NCPDP) established standard billing practices including Dispense As Written (DAW) codes.
    - If you question the DAW code, call the Pharmacy Support Desk.
  - Prescription Origin Code
    - auto-populated for electronic prescriptions
    - defaults to “Written” for all other prescriptions
    - **must manually adjust the Origin Code for faxed or telephoned Rxs**
- Notes can be accessed or added.
  - Prescription Notes – a note that applies to all fills of the Rx
  - Transaction Notes – a note that applies only to the current transaction of the Rx
  - Patient Notes – a note for the patient profile regarding the patient
  - Prescriber Notes – a note for the prescriber profile regarding the prescriber
  - Third Party Notes – notes added by Pharmacy Operations about the third party plan being used

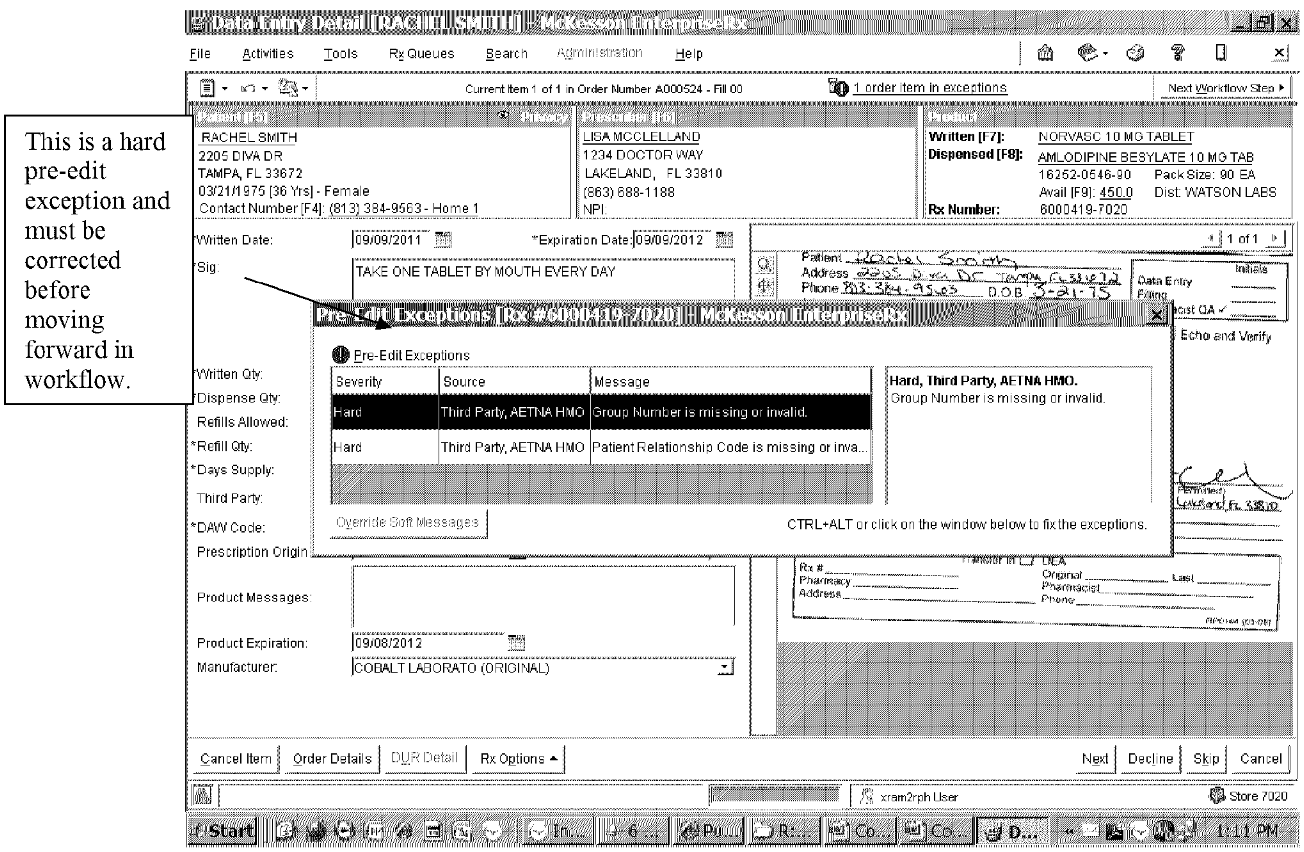
Handling Pre-edits

- Pre-edits are edits set up within EnterpriseRx.
- Review and response to the edit or correction of issue causing the edit is required to complete Data Entry.
- **The pre-edit popup cannot be removed by selecting the “x” in the top corner of the pop-up.**
- When the popup is on your screen, work can still be completed on the screen. It does not deactivate the workflow screen in the pharmacy system.
- Move the popup on the screen by clicking on the bar at the top of the popup and dragging the popup to another location on the screen.

Types of pre-edits

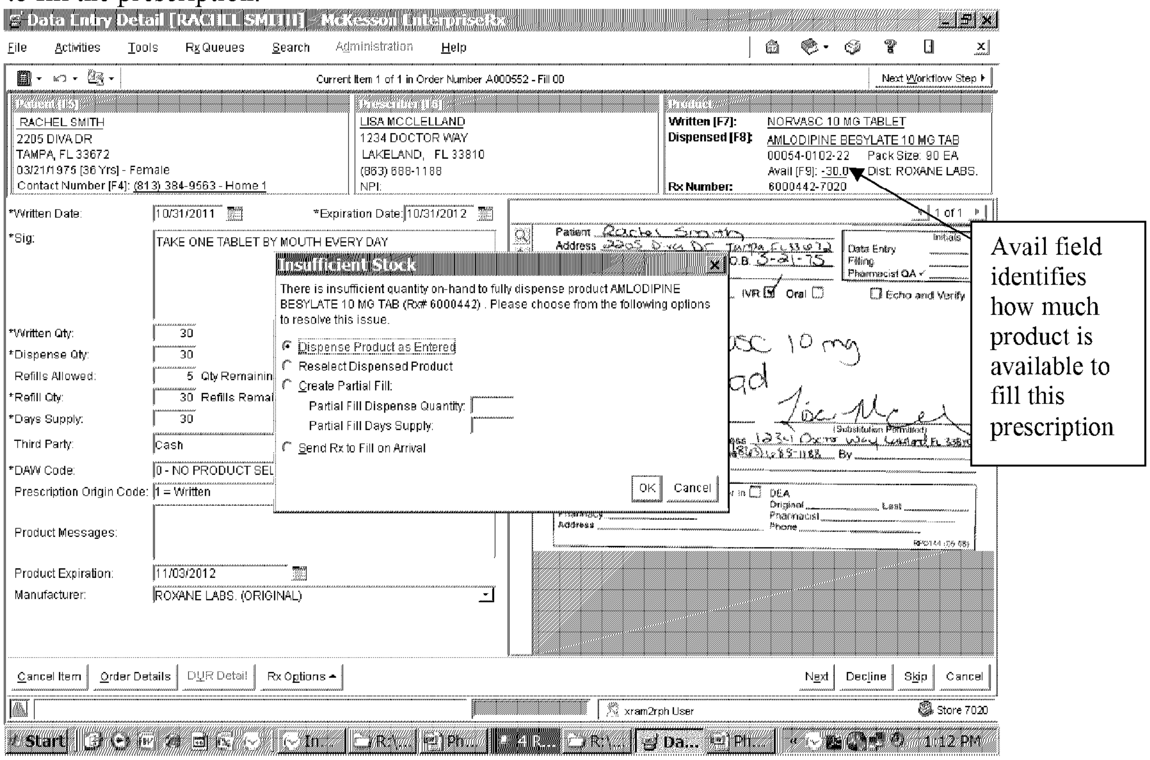
Type of Pre-Edit	How to Respond
Informational	Read the information on the edit and respond as necessary. To move forward, perform the next step in workflow and the box will simply disappear.
Soft	Read the information on the edit, respond as necessary, and then click the **Soft Edit Override** button on the popup. Enter any number in the override field and hit **Enter**. To move forward, perform your next step in workflow and the box will simply disappear.
Hard	Read the information on the edit and respond to the specific hard halt message (e.g., fix information in the patient profile). To move forward, correct the problem then perform your next step in workflow and the box will simply disappear.

Sample screen with a pre-edit exception



Handling the insufficient stock reminder

Another popup that may present itself before you can finalize Data Entry is the Insufficient Stock popup. This presents itself if the product you chose does not have a sufficient on-hand quantity to fill the prescription.



The popup will give you 4 choices. When looking at the choices, you should consider the amount of product that is available (Avail field – see above) to fill the prescription you are working on.

Pop-up Option	Explanation
Dispense Product as Entered	This option will move the Rx into the next stage of workflow with a negative balance on-hand. Note: This may be used when there is plenty of stock on the shelf and the on-hands are wrong in the system. **Correct the on-hands immediately.**
Reselect Dispensed Product	This option will allow you to choose a different product to dispense, if there is another product with available quantity.
Create Partial Fill	This option will send a partial fill transaction to the next stage of workflow, allowing you to dispense a small portion of the Rx until more product arrives. Once you finish filling the partial fill, a completion fill will go to the Fill on Arrival queue while waiting for additional product to arrive. Note: The Fill on Arrival queue holds prescriptions waiting to be filled by product that is on order. You will learn more about this queue in a later module of this training program.
Send Rx to Fill on Arrival	This option will send the entire Rx to the Fill on Arrival queue while waiting for additional product to arrive.

Important note: Always inform the customer if we do not have enough medication in stock to fill the prescription. Neighboring pharmacies may have the medication in stock.

How to ensure proper reimbursement for a prescription

You can provide a high-quality product and provide premier service to our customers, only to find out that your pharmacy is not getting paid properly for the effort because of billing errors. Below is a list of basic billing requirements that need to come together to ensure the pharmacy is reimbursed properly for prescription claims:

1. Ensure all appropriate information is included on the face of the hard copy (or within a Prescription Note in the pharmacy system) considering the schedule of the drug and Federal and state requirements.
2. Prescriptions with a DAW 1 should always have a *brand medically necessary* notation on the face of the hard copy – requirements differ by state law.
3. Prescriptions with a DAW 2 should always have a *Pt Requests Brand* notation on the face of the hard copy.
4. *Use as directed* Sigs should be avoided. If used, the maximum daily dose should be included on the hard copy.
5. Days supply must be properly calculated.
6. Ensure appropriate patient signatures are captured at Release to Patient.
7. Prescriber NPI, DEA and state license # need to be included on the claim, but also need to be CORRECT

Workflow Safety Tips

- Below is a summary of safety tips for Data Entry
  - Use the *5 letter plus strength* drug search protocol
  - perform product search based on drug name, then ensure you select the correct strength and form
  - check product notes for special sig codes
  - use sig codes whenever possible (instead of free form sigs) so system can calculate days supply
  - tab through data entry fields to allow the system to calculate certain fields properly
  - review all data entry components against the hard copy before hitting NEXT

Pharmacist I/New Hire Graduate Intern Training
Required Courses

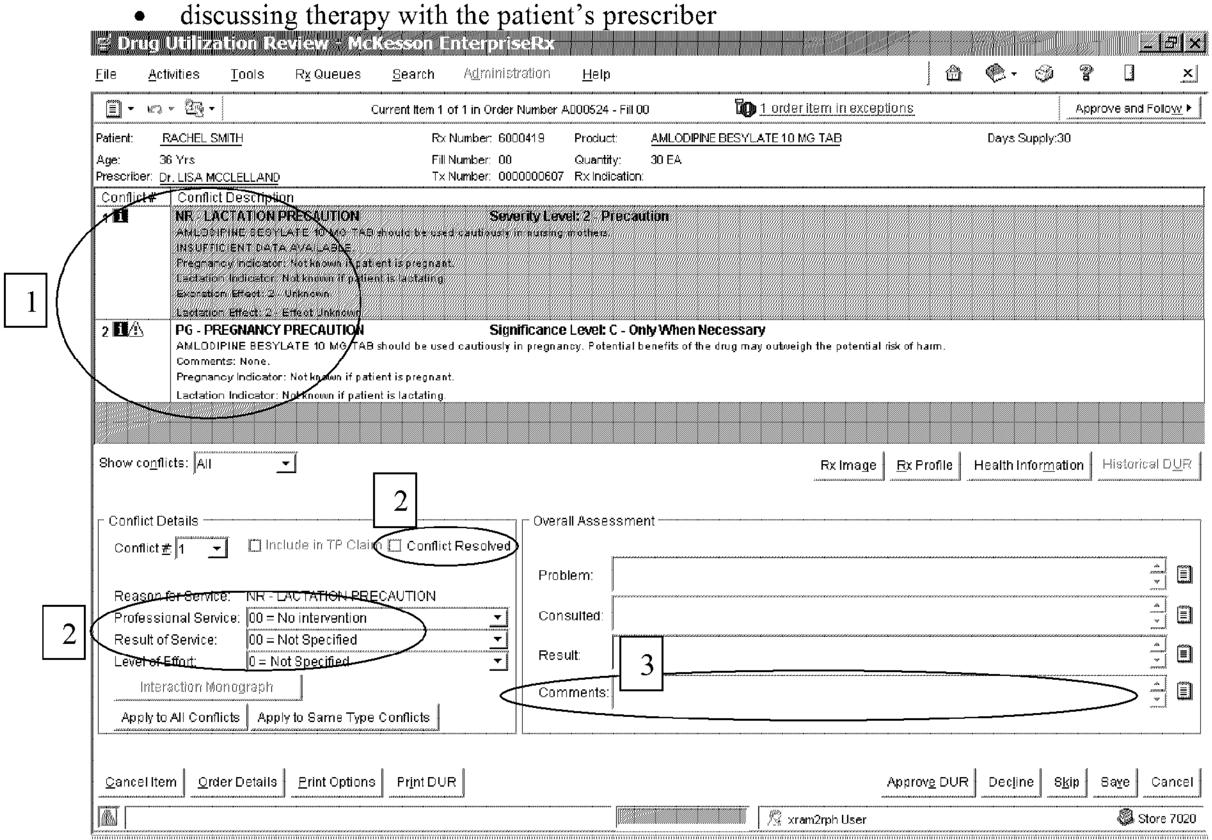
Course Name DUR/Pre-Verification (PV1)

Course Description a detail dive into DUR/Pre-Verification (PV1) processes including standard procedures and safety protocols

Graduate Intern Note: Please remember, the DUR/PV1 processes can only be completed by a licensed pharmacist. While in training and working as a graduate intern, you must only shadow a licensed pharmacist to learn the process for when you become licensed.

Overview
- All Drug Utilization Reviews (DURs) in PV1 are presented before dispensing.
- Pharmacist Verification 1, also called Pre-Verification 1 (PV1) occurs before Final Verification - presented on all initial fills and first refills.

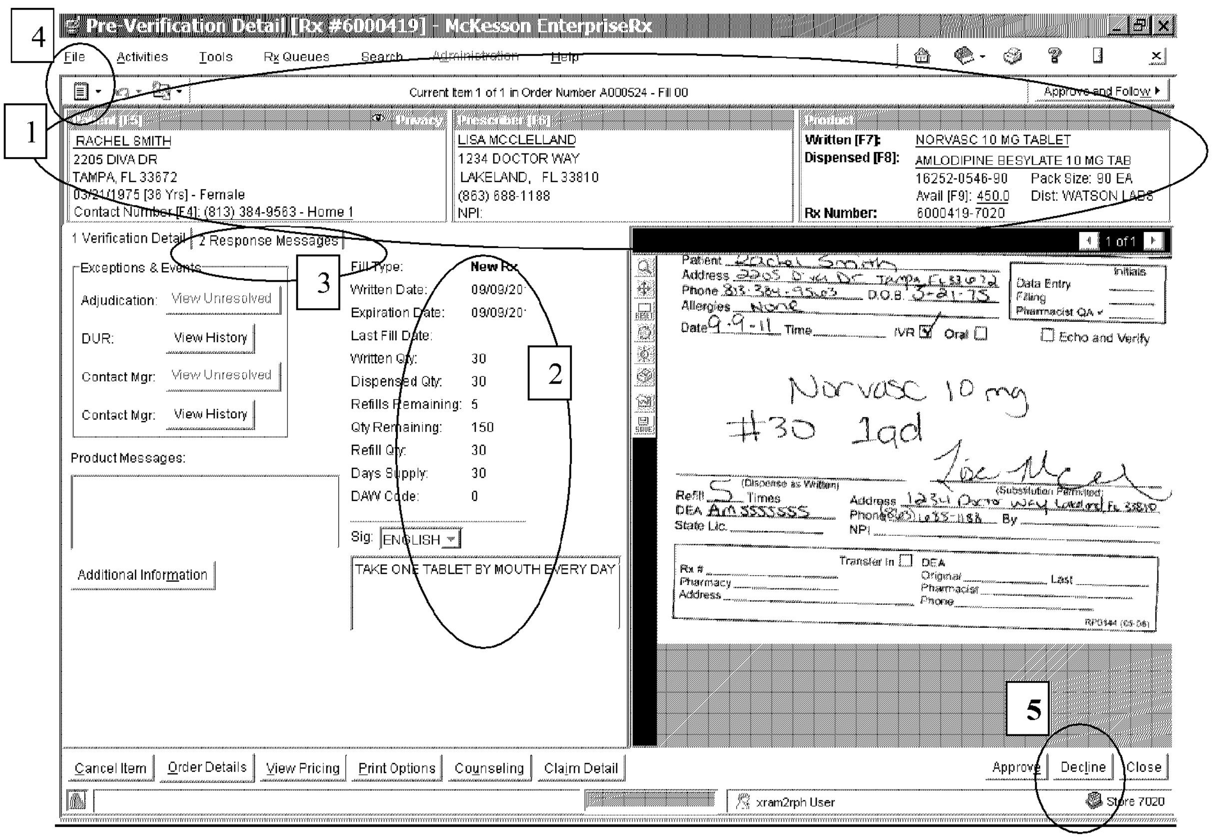
DUR Protocol
1. Review all conflicts considering the impact to patient safety. Depending on the DUR, consider:
   - selecting Rx Image to view the hard copy
   - accessing the patient's profile to review Rxs, allergy info, and/or medical info
   - referencing drug resources including Clinical Pharmacology
   - discussing therapy with the patient's prescriber



2. If the DUR is a TP DUR, you must select a Professional Service code and a Result of Service code, then check the Conflict Resolved box.
3. For significant DURs involving an approval or a decline, document the results of your review in the Overall Assessment section of the DUR screen.

PV1 Protocol

1. Verify the following using the hard copy against the top of the screen:
   - Patient name & DOB
   - Prescriber name & location
   - Written drug name, strength and form (verify dispensed drug is appropriate substitute)
2. Verify the following using the hard copy against the left of the screen:
   - Written date
   - Written quantity
   - Refills remaining (new Rx vs. 1st refill)
   - Days supply
   - SIG
3. As necessary, click on the Response Message tab to evaluate any TP response messaging.
4. Add Counseling notes (regarding patient safety or communication) as necessary.
5. Use the Decline button to correct as necessary and continue, otherwise Approve with your RDAC.



Pharmacist I/New Hire Graduate Intern Training
Required Courses

Complete the Proper Handling of DURs video in Learning

Course Name	Course Description	Type	Length	Facilitator
Proper Handling of DURs	This video reviews the importance of handling all DURs properly, to ensure our patient's safety	Video	5 mins	Learning

- **How to Access:** Log into Learning through Passport on your store's training workstation. Locate the Compliance CBT listed above on your To Do list and click the Start button.
- **Note:** The course listed above must be taken before moving on to any other courses.

DUR/PV1 Tips
- Work these throughout the day keeping workflow moving by working from the DUR/PV1 Activity.
- **Do not use** the Apply to All Conflicts or Apply to Same Type Conflicts buttons on the DUR screen.
- PV1 may at times be worked by another store or Central Pharmacy (you'll learn more in Module 12 about this).

Workflow Safety Tips
- Below is a summary of safety tips for DUR/PV1
    - review all DURs presented
    - adequately notate reasons for DUR overrides and use professional service and results of service codes
    - verify the information on the hard copy with the data entry elements in the system
    - always confirm DOB against the hard copy before approving even if the name is familiar

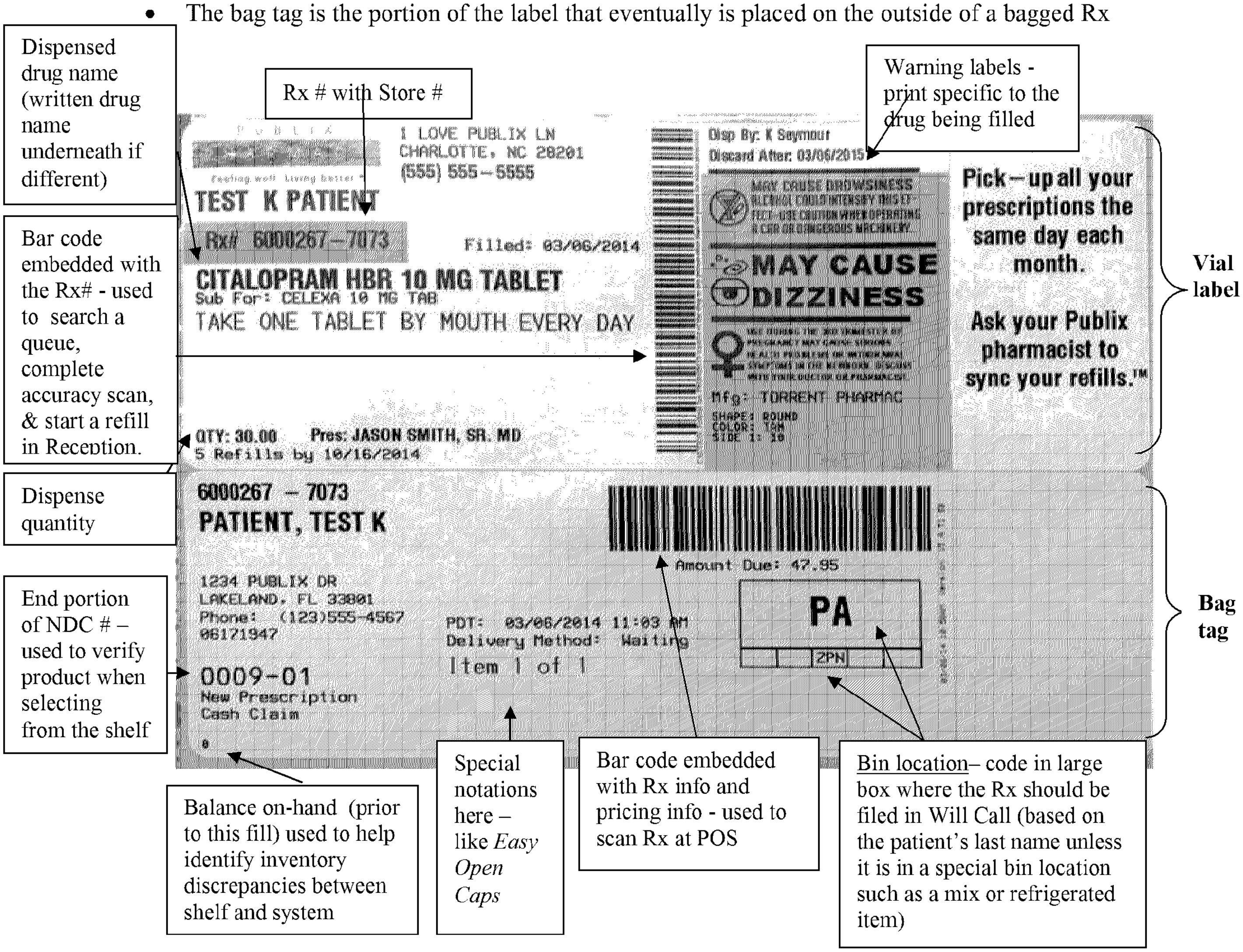
Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name Publix Pharmacy - Product Dispensing & Related Processes

Course Description a detail dive into product dispensing processes including standard procedures and safety protocols

<u>The Vial Wrap</u>

- The vial label is the portion of the vial wrap that goes on the vial
- The bag tag is the portion of the label that eventually is placed on the outside of a bagged Rx



Product Dispensing Protocol with Tips

These steps are important for patient safety and efficiency.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Label prints for the patient once prescription accessed in Product Dispensing.
Batch printing is not permitted to avoid confusion among different labels for different patients.
Labels for a patient will print – so if one patient has 3 prescriptions ready to fill, then 3 labels will automatically print.</td></tr>
<tr><td>2</td><td>Verify the patient name and drug printed on the label matches the Patient and Product fields on the top of the Product Dispensing screen, as well as the prescription hard copy image on the screen.</td></tr>
<tr><td>3</td><td>Use Vial Wrap to select the correct product from the shelf referencing the drug name and NDC.
The NDC will ensure you are selecting the right strength and form of the drug</td></tr>
<tr><td>4</td><td>Verify that the product is not expired by reviewing the expiration date.
If the Expiration date is less than a year from now, enter the expiration date from the product into the Product Expiration date field on the Product Dispensing screen.</td></tr>
<tr><td>5</td><td>Complete the accuracy scan in EnterpriseRx by scanning the prescription barcode on the vial wrap and the stock bottle NDC barcode.
The accuracy scan is set to work down to the pack size.
Do not override an accuracy scan until you completely verify the situation.
Check the hard copy, product selected in the system and the stock bottle carefully before deciding to override an accuracy scan.
If you find that the scan isn't working, yet you know you have the correct product, ensure to call in the issue to the Pharmacy Support Desk to research further.
The accuracy scan must be performed for only one prescription at a time, meaning: you must always perform the accuracy scan, count, then label the prescription before performing an accuracy scan for another prescription.</td></tr>
<tr><td>6</td><td>Verify the image of the pill on the Product Dispensing screen matches that of the product you scanned.</td></tr>
<tr><td>7</td><td>Count and label the prescription, ensuring to pay attention to special notations on the bag tag (i.e., Easy Open Caps).</td></tr>
<tr><td>8</td><td>Adhere bag tag to the bag tag slip (do not apply bag tags directly to the bag).
For refrigerated and reconstituted products, use the MIX or REFRIG stamp next to the appropriate bag tag slip.</td></tr>
<tr><td>9</td><td>Place the bag tag slip inside the clear zip style prescription bag with the btag tags facing the completely clear side of the bag.</td></tr>
<tr><td>10</td><td>Place prescription bag and prescription vial(s) in a basket and pass to the Final Verification pharmacist and click Next in the system to ensure the prescription continues through workflow.
There must be no more than the authorized number of baskets on the counter at any time between Product Dispensing and Verification. Baskets are to be lined next to one another, not stacked on top of one another. See the chart below for the approved basket limits.
<table>
<tr><th>Baskets</th><th><1,000 Rx's/week</th><th>1,001-2,000 Rx's/week</th><th>>2,000 Rx's/week</th></tr>
<tr><td>Between PD & FV</td><td>5</td><td>8</td><td>10</td></tr>
<tr><td>Total Baskets in Pharmacy</td><td>12</td><td>24</td><td>24</td></tr>
</table></td></tr>
</table>

<u>Workflow Safety Tips</u>

- Below is a summary of safety tips for Product Dispensing
    - print one patient's labels at a time (do NOT batch print)
    - select product off shelf using drug name <u>and</u> NDC
      (Don't assume the accuracy scan will confirm the product anyway. If the wrong bottle is pulled, it is now on the counter and could possibly be used after the accuracy scan.)
    - dispense one Rx at a time
    - perform accuracy scan for one prescription, <u>then</u> count > label > put in a basket > hit NEXT
    - don't leave any unlabeled vial sitting on the counter for more than 2-seconds
    - use the image of the pill to verify that it matches the product you are counting
    - check expiration on stock bottle against system
    - put the completed prescription (bag tag/bag tag slip) in a basket and pass to the *Verification* workstation
      Note: There must be no more than the authorized number of baskets on the counter at any time between *Product Dispensing* and *Verification*. Baskets are to be lined next to one another, not stacked on top of one another
    - put away stock bottles in a timely fashion or ensure segregated from other stock on the counter

Pharmacist I/New Hire Graduate Intern Training
Required Courses

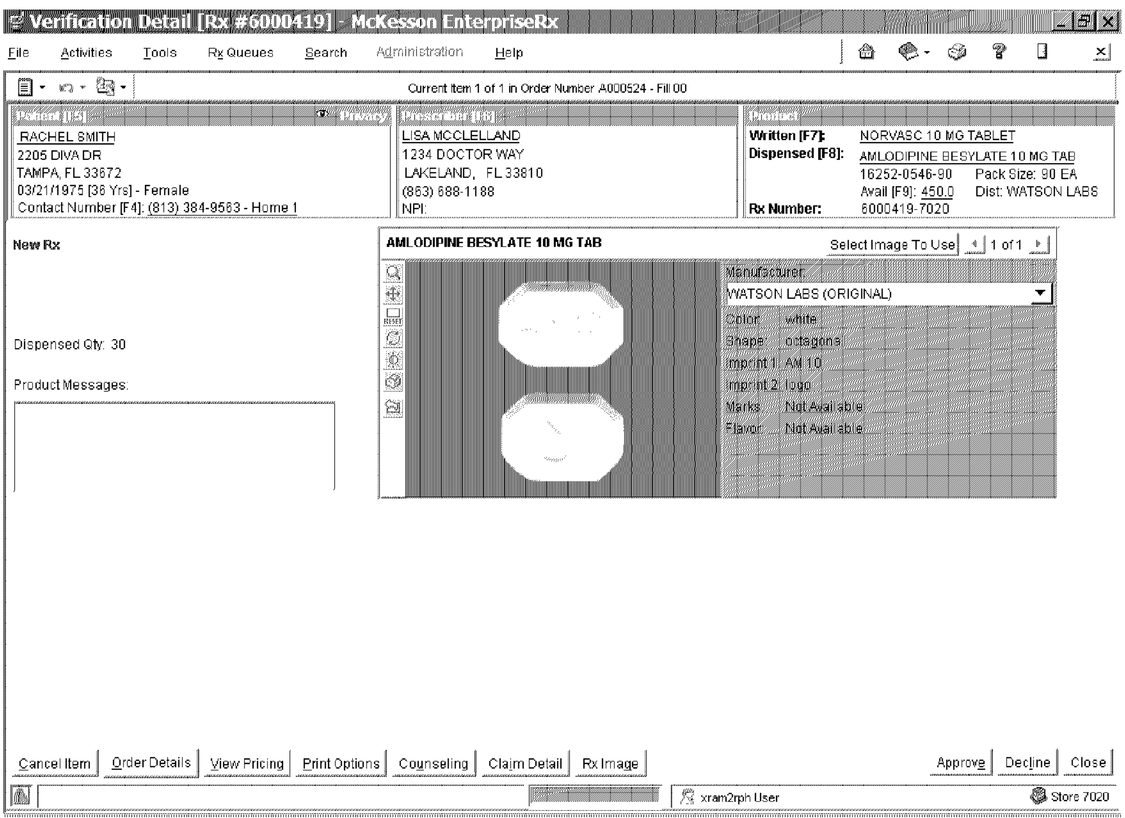
Course Name Final Verification

Course Description a detail dive into final verification processes including standard procedures and safety protocols

Graduate Intern Note: Please remember, the Final Verification processes can only be completed by a licensed pharmacist. While in training and working as a graduate intern, you mush only shadow a licensed pharmacist to learn the process for when you become licensed.

<u>Overview</u>
Final verification = ensuring the prescription was properly dispensed

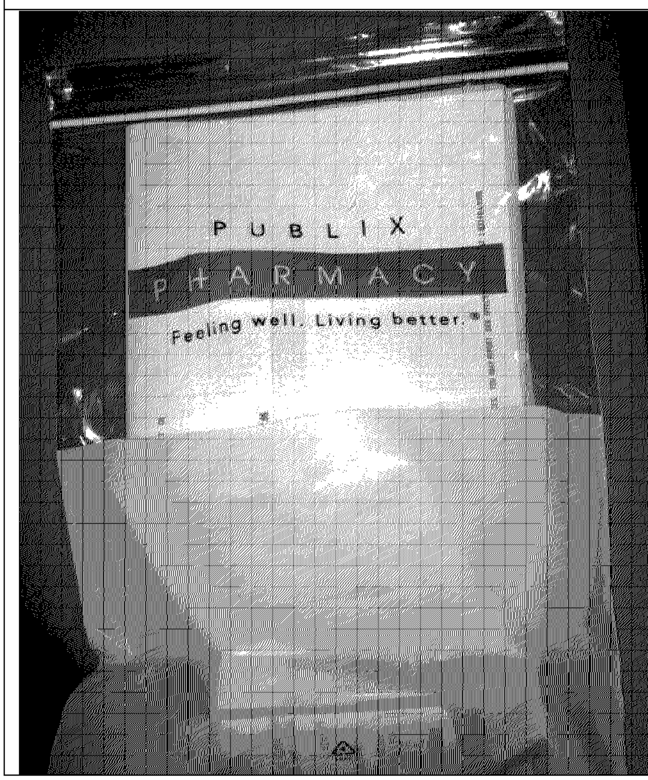
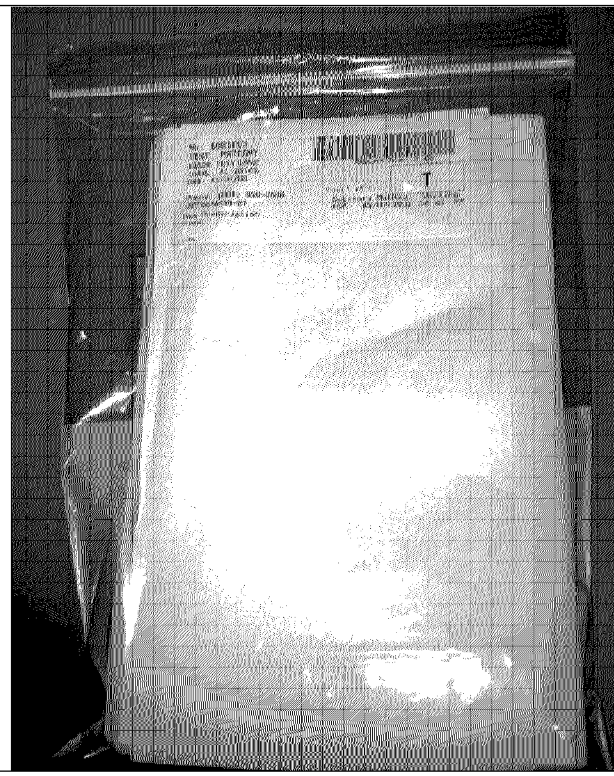
<u>Final Verification Protocol</u>
1. Scan the filled prescription vial to pull up the prescription in queue
   - Scanning the vial ensures the system pulls up the correct prescription in the system removing the chances of a pharmacists "selecting" the wrong prescription from the queue
2. Check that contents of the bottle match image and image information on the screen
3. Evaluate the dispensed quantity considering product features such as unit dose and administration route.
4. Use the Decline button to correct as necessary and continue, otherwise approve with your RDAC.



Bagging the Rx

1. Always complete verification and bag one order at a time. Retrieve Patient Receipt and Education (PRE), as well as, any of the following if applicable - Medication Guide, LDM printouts, Notice of Privacy Practices. Then fold them in half with the PRE on the outside.
2. Compare the patient's name on the vial wrap, bag tag slip, and PRE at the time of assembling the bag.
3. Place the patient materials inside the prescription bag with the patient information at the bottom facing forward (with PHI protected by the opaque part of the bag), and the blank portion at the top, visible from the logo side of the bag.
4. Slide the bag tag slip in the back with the face of the tags facing out on the clear side of the bag.

Example of bagged prescription:

Front view (#3 above)	Back view (#4 above)
	

Filing Bagged Rxs

Bin locations

- important that the bagged prescriptions placed in the will call bins adequately secure our patients' protected health information (PHI)
- most prescriptions are filed in will call bins, but special areas are noted in chart below
- the bin location is printed on the bag tag so you know where to store the completed prescription

Bin Type	Bin Name	Location
Normal	A-Z	Fits in alphabetized will-call bins
Oversized	OZ1	Oversized prescriptions that won't fit in the will-call bins are located in a designated area in your pharmacy.
Refrigerated	RF1-RF49	Refrigerated prescriptions are located in the refrigerator in your pharmacy.
Reconstituted	MIX1-MIX49	Prescriptions that need to be reconstituted before releasing to the patient are located in a designated area in your pharmacy.
Ship	SHIP1	Prescriptions that are shipped/mailed to a patient are located in a designated area in your pharmacy.
Delivery	DLVR1	Prescriptions that are awaiting delivery to the patient are located in a designated area in your pharmacy.

Protocol for filing completed prescriptions

1. Ensure the patient name on the Patient Receipt and Education (PRE) matches the patient name on the bag tag. **If they do not match, immediately resolve.**
2. Using the bin location printed on the bag tag and the patient's last name, file the completed prescription in the alphabetized will-call bins or in other designated areas in your pharmacy (e.g., oversized prescriptions).

   Note: A completed prescription stored in the refrigerator or one that must be reconstituted will not be in the bag. You must stamp the bag with *MIX* or *REFRIG* next to the bag tag and file the bag with the PRE at will-call. (Central Fill refrigerated or reconstitute Rxs must be removed from the bag and put in the appropriate special handling area while only the bag with paper contents is filed in Will Call.) When the patient arrives, the prescription will be retrieved from the appropriate area in your pharmacy.

Special Order OTCs

To special order OTCs use the Special Order Form.

Workflow Safety Tips

- Below is a summary of safety tips for Final Verification
    - verify and package one order at a time
    - scan Rx label first to bring up Rx that is being verified…do NOT select off of the screen
    - always visually verify product image on the screen with the product in the vial
    - evaluate the dispensed quantity considering the product features (like unit dose and administration route)
    - retrieve PRE, LDM and med guides for each order and bag that order prior to moving to the next order
    - compare patient name on label, bag tag and PRE at the time of bag assembly

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Module P6:
MethGuard Training

Module Description:
regulations and the importance of compliance to these regulations

Course Name	Course Description	Type	Length	Facilitator
MethGuard	DEA regulations regarding pseudoephedrine products including product types, conversion charts, logbook requirements, state requirements plus references to our policies	CBT	1hr	Learning

How to Access: Log into Learning through Passport on your store's training workstation. Locate the Compliance CBT listed above on your To Do list and click the Start button.

Note: This course must be taken before moving on to any other courses.

__**Legend**__
CBT – Computer based training

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Module P7:
Physical & System Workflow III

Module Description:
Complete overview of RTP processes and patient, prescriber & drug profiles

Course Name	Course Description	Type	Facilitator
RTP & Related Processes	a detail dive into Release to Patient processes including standard procedures and safety protocols	ILT	Training Location RPh
Patient Profile	a detail dive into patient, prescriber and drug profiles	ILT	
Prescriber Profile		ILT	
Drug Profiles		ILT	

Legend
ILT – Instructor-led training

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name: Publix Pharmacy – Release to Patient & Related Processes

Course Description: detail dive into Release to Patient processes including standard procedures and safety protocols

<u>Release to Patient (RTP) Protocol</u>
This is extremely important protocol for patient safety.

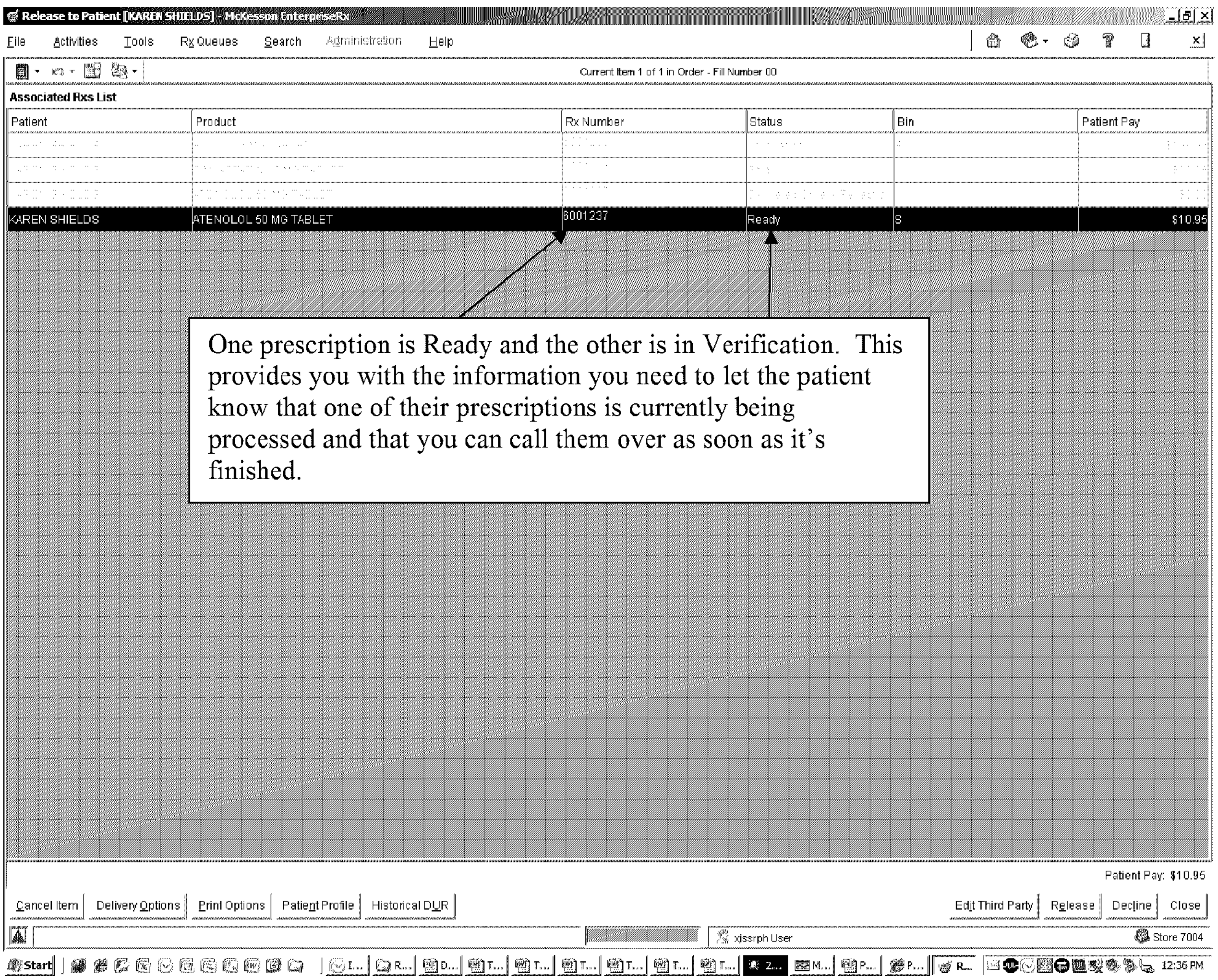
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Welcome the patient. Ask for:
• patient's name and
• number of prescriptions being picked up.</td></tr>
<tr><td>2</td><td>Find the prescription(s) in the system and note the bin location.</td></tr>
<tr><td>3</td><td>Pull the prescription(s) from the designated pharmacy location.</td></tr>
<tr><td>4</td><td>Verify that you pulled the right prescription(s) for the patient.
• Ask for the patient's address, then make sure the patient's name and address matches the information on the prescription bag tag and medication vials.
Note: This is an extremely important step in verifying you have the right prescription(s) for the patient. The patient should TELL you their address, DO NOT read the address to the patient and ask if it's correct. Also, if the address doesn't match the system, DO NOT change the address unless you have verified that the profile you are pulling up is in fact that patient's profile (e.g., maybe they moved recently).</td></tr>
<tr><td>5</td><td>Is the Rx for a refrigerated or reconstituted product?
<table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>Yes</td><td>1. pull the appropriate patient's Rx from the refrigerator or reconstituting area
2. verify and initial the Rx label and then bag the Rx.
Note: A pharmacist must always perform step #2 whether another pharmacist or a technician performs step #1.</td></tr>
<tr><td>No</td><td>Go to next step.</td></tr>
</table></td></tr>
<tr><td>6</td><td>Verify that the prescription was properly billed.</td></tr>
<tr><td>7</td><td>Release the prescription in the system.
• arrow through each of the prescriptions in the order and read all Transaction (Tx) notes and Counseling notes that pop up on each prescription.
Note: There may be very important information for you as the pharmacist to go over with the patient.
• Counsel the patient.
Note: Each state has different counseling rules. Refer to the rules in your state regarding the offering of counseling to your patients.
• If the Auto-Refill popup box comes up, let the patient know that you will automatically refill their prescriptions when they are due. Let the patient know we will call them when the prescriptions are ready.</td></tr>
<tr><td></td><td>Click the Release button which will prompt the signature capture device requiring
• <u>new</u> patients to acknowledge receipt of our Notice of Privacy Practices as required by HIPAA regulations, and
• all patients to acknowledge (as required by third-party contracts)
    ○ receipt of prescriptions and counseling was offered
    ○ eligibility for insurance benefits claimed (if used insurance), and
    ○ treatment for on-the-job injury (if used workers compensation insurance)</td></tr>
</table>

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Step	Action
8	Ring the sale on the register by scanning each prescription's bag tag. • Scan all prescriptions, even $0 co-pays!
9	Thank the patient and invite them back.

Find the prescription in the system

When searching for the patient in the RTP queue, you may find that only part of a patient's order is ready.



What if you can't find the patient at all when you search for them in RTP? It could mean that no prescriptions are ready or maybe the customer is at the wrong Publix Pharmacy.

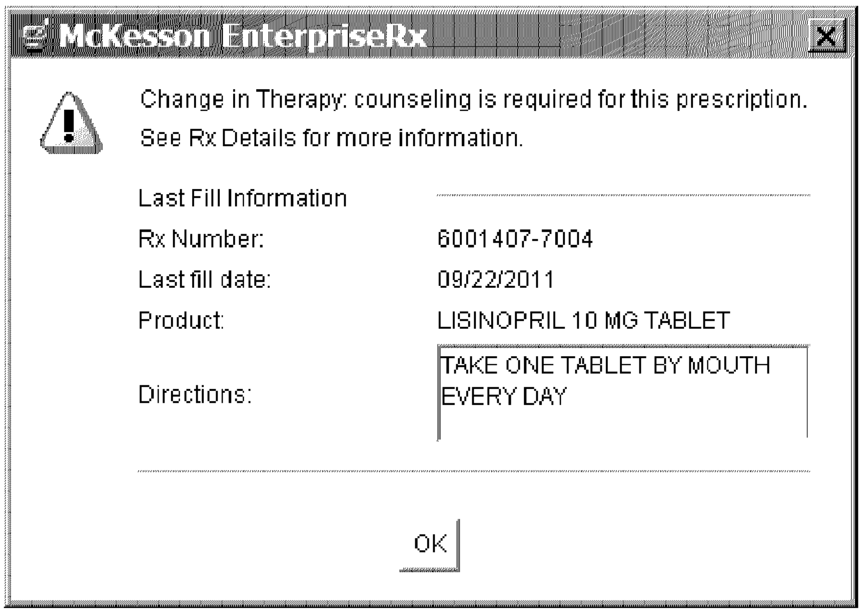
- Use the All Rx Status (F3) function to search for this patient in your system.
- If you still cannot find a prescription for the patient, you'll need to access the patient's profile to determine if it's been filled at another location.

Ensure to review all Transaction and Counseling Notes!

- Important notes may be presented in different formats at RTP and you must carefully review them prior to providing the medication to the patient.
- Once you access the Release to Patient screen containing a patient's prescriptions, you **must** click on each prescription in the Ready status (you can also use your arrow button to move through the prescriptions on the screen) to see the Transaction and Counseling notes associated with <u>each</u> prescription.

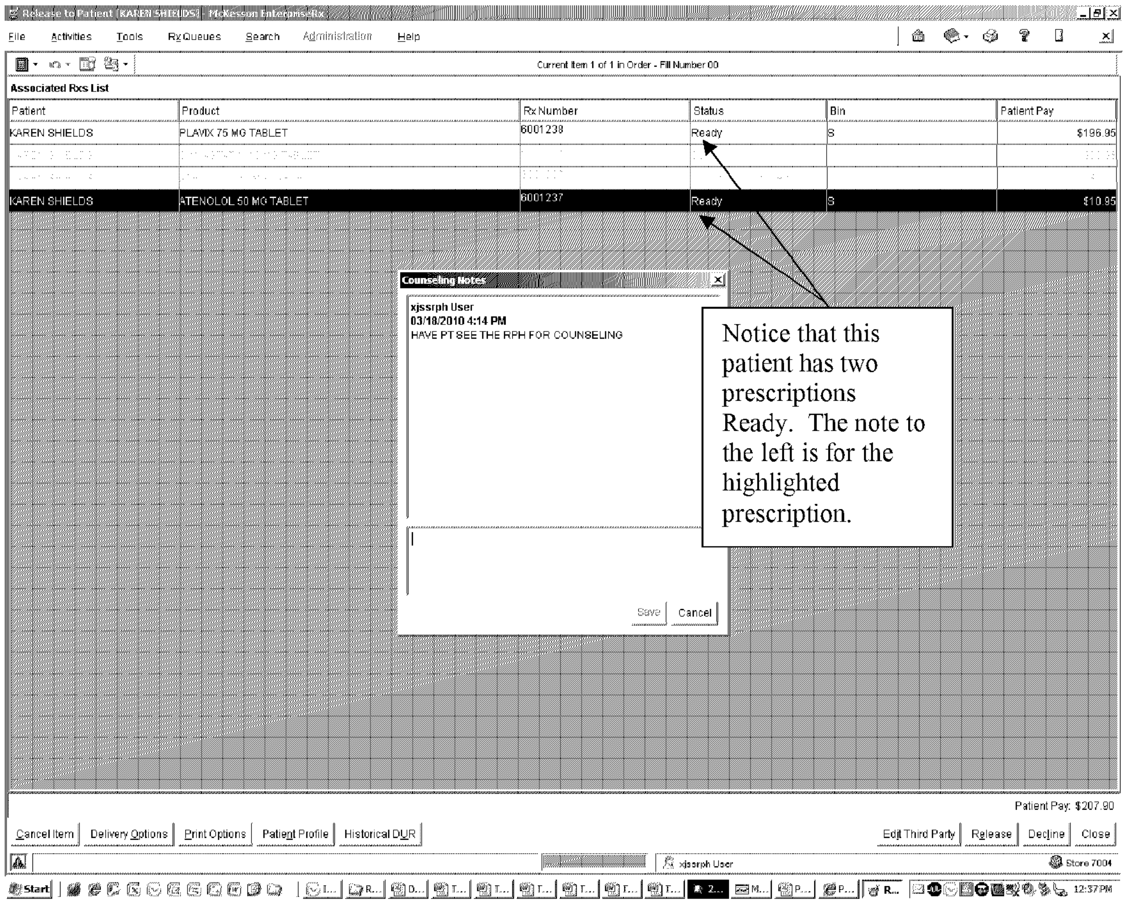
  <u>Types of Transaction and Counseling Notes</u>

  This message may present itself when the directions on a prescription have changed since the last prescription for this medication.

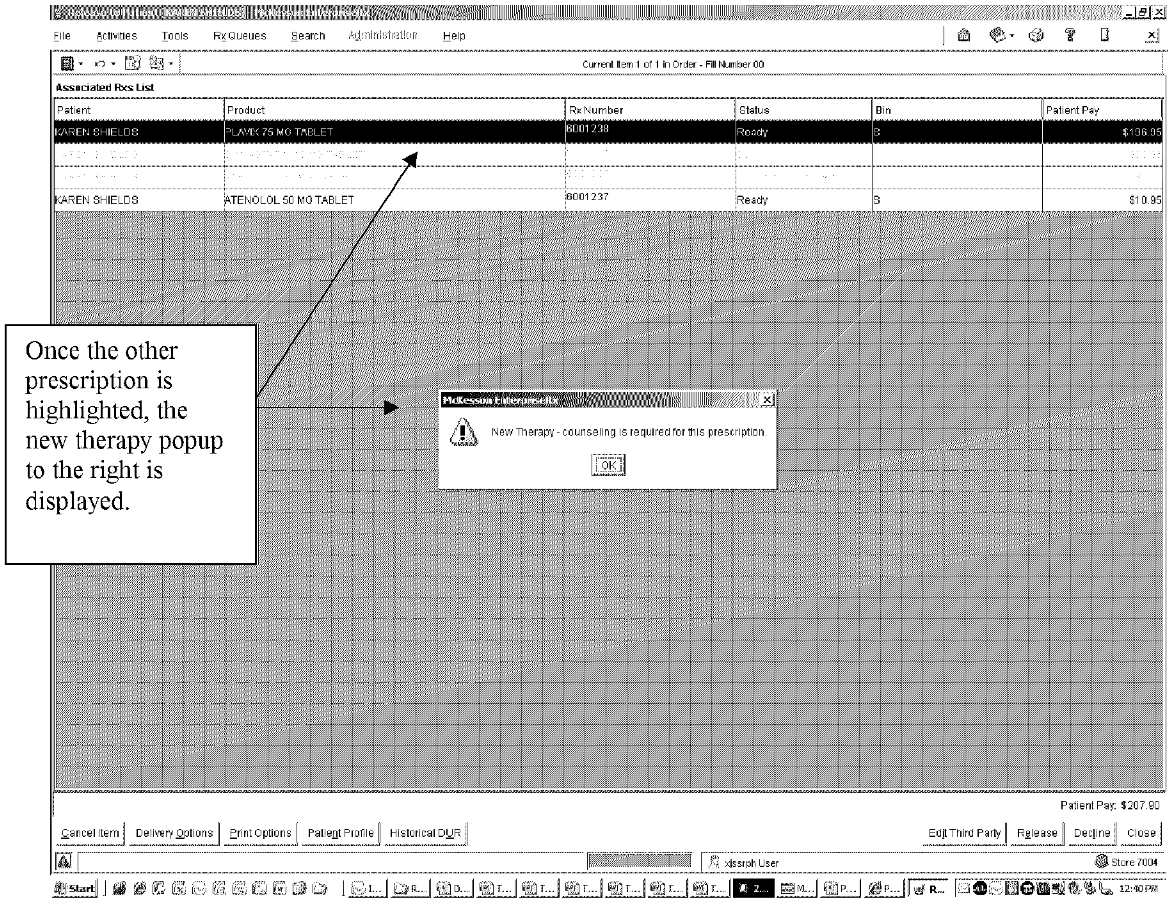


Pharmacist I/New Hire Graduate Intern Training
Required Courses

This is an example of a Counseling Note which was added to the patient's prescription by the Pharmacist earlier in workflow. When you access the patient's prescription in RTP, this Counseling Note pops up on the screen. It's associated with the highlighted prescription.



In this example, when you highlight the other prescription that is in Ready status you'll see an important note for that prescription. In this case, the system presents a New Therapy popup which indicates that this is a new medication for this patient. The Pharmacist should be made aware of this so that counseling can take place.



Patient counseling

- Refer to Ch. 9 of the Pharmacy Reference and Procedures Guide for counseling tips.
- It is important to always review Tx Notes for counseling points that may have been identified during the prescription filling process.
- Pharmacists must offer counseling for all new patients and patients with new prescriptions.
- Always inform the patient to give you a call if any questions come up later.

Release First, then Ring the Sale!

- It's imperative to Release the prescription in the pharmacy system first, and then ring up the sale on the register. This ensures we:
  - capture the signature acknowledgements required by law and third-party insurance contracts, and
  - avoid future filling and billing issues caused by not completing the transaction correctly in the pharmacy system.

New Patient HIPAA Acknowledgement

Below is a sample of what comes up on the signature capture device for new patients to acknowledge receipt of our Notice of Privacy Practices as required by HIPAA regulations. We often refer to this as the *HIPAA Acknowledgement.*

HIPAA Acknowledgement

My signature directly below as the patient, guardian, or the authorized personal representative of the patient certifies, on behalf of the patient, that this pharmacy has provided me with a copy of Publix Super Market's *Notice of Privacy Practices (Notice).* The *Notice* explains the uses and disclosures of protected health information (PHI) that may be made by Publix as well as the patient's rights and Publix's duties with respect to PHI.

☐ I am the patient, guardian, or authorized representative

Accept **Refuse** **Cancel**

Patient Insurance/Counseling or Third-Party Acknowledgement
Below is a sample of what comes up on the signature capture device for all patients to acknowledge that

- prescriptions were received
- counseling was offered
- insurance eligibility is claimed (if using insurance), or
- treatment for on-the-job injury is claimed (if using workers compensation insurance)

Prescription Counseling and/or Insurance Claim Acknowledgement

Scroll Bar

By my signature directly below as the patient or the authorized personal representative of the patient, I certify that this Publix Pharmacy has offered patient counseling on the medication dispensed and that the prescription identified below was received. I understar that I have a duty to update my health information and that my health care provider who prescribed my medicine is solely responsible for the management of my drug therapy. **Prescription Drug Coverage and Patient Authorization:** By my signature below I certi that the information contained on my prescription benefits card or reported to the Publix Pharmacy is correct and that the person for whom the prescription was written is eligible f the benefits claimed. I authorize the release of all information regarding the prescription a d claim to which it corresponds to Publix Super Markets and as Publix deems necessary to

I'm receiving rx #

- ● I accepted counseling
- ○ I declined counseling

Done

Notice that the written information at the top of the sample screen is actually an area that scrolls on the screen. So, the customer can scroll through the written information to read everything. The full text is on the next page for your information.

This is the full acknowledgement language that the customer can review on the signature capture device. We often refer to this as the *Third-Party Acknowledgement*.

Prescription Counseling and/or Insurance Claim Acknowledgement

By my signature directly below as the patient or the authorized personal representative of the patient, I certify that this Publix Pharmacy has offered patient counseling on the medication dispensed and that the prescription identified below was received. I understand that I have a duty to update my health information and that my health care provider who prescribed my medicine is solely responsible for the management of my drug therapy.

Prescription Drug Coverage and Patient Authorization: By my signature below I certify that the information contained on my prescription benefits card or reported to the Publix Pharmacy is correct and that the person for whom the prescription was written is eligible for the benefits claimed. I authorize the release of all information regarding the prescription and claim to which it corresponds to Publix Super Markets and as Publix deems necessary to receive payment, and for treatment and health care operations.

For Customers with Workers' Compensation Coverage: Your signature certifies that this medication is for the treatment of an on-the-job injury.

Scroll Bar

<u>Workflow Safety Tips</u>

- Below is a summary of safety tips for Release to Patient
  - always verify patient's address with open ended question
  - always ask how many prescriptions patient is expecting
  - verify patient name and address is on the bag tag <u>and</u> patient name is on the medication vials & PRE
  - ensure pharmacist verifies product that is reconstituted or pulled from the refrigerator at RTP
  - counseling is required for all new therapy prescriptions and changes in therapy

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name Patient Profiles

Course Description a detail dive into the patient profile

Overview
Key concepts:
- one profile for each patient, shared by the whole company – centralized pharmacy system
- information in profile used to trigger system edits, third-party edits, and clinical edits
- integrity and accuracy of each profile is imperative for patient safety and proper billing
- each pharmacist is responsible for accuracy and integrity of data in the system!

Detail Dive into the Patient Profile

Below are screen shots with key components of each tab within the patient profile.

Tab 1: Info

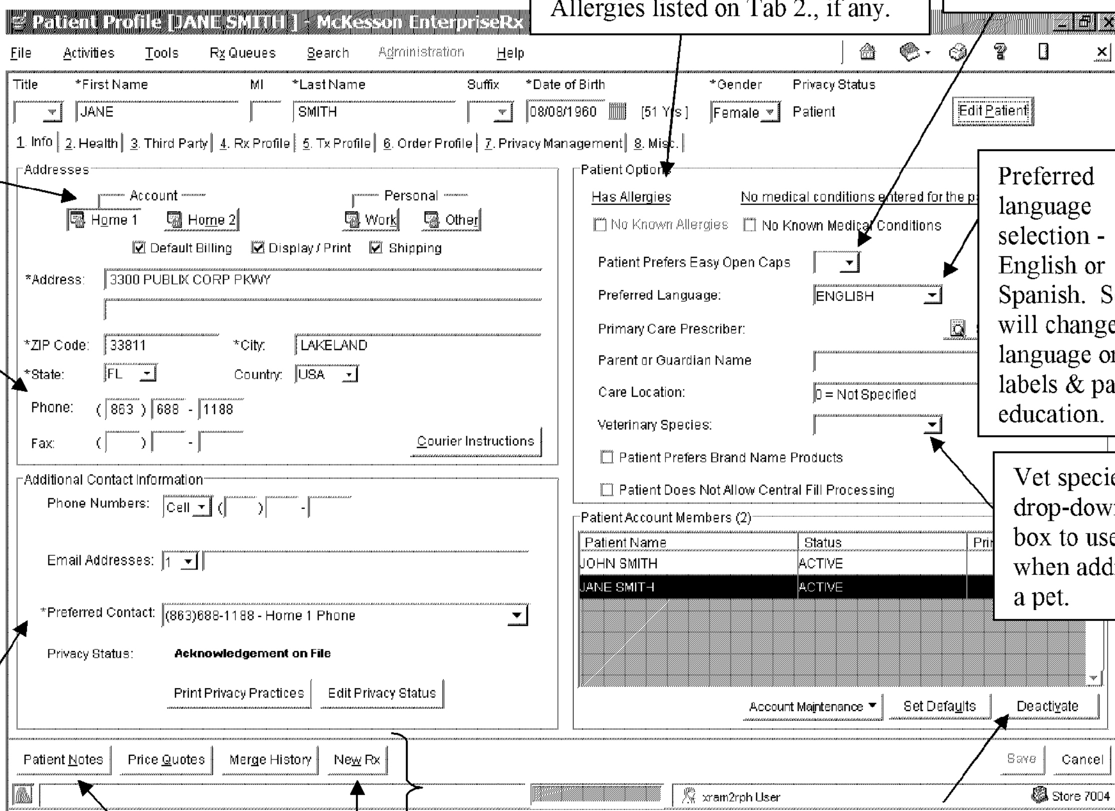
Drop-down box for easy open caps. For safety reasons, this is changed to "yes" only upon request.

Notification identifying whether or not patient has allergies. Allergies listed on Tab 2., if any.

Patient Address – notice the ability to add more than 1 address.

Patient's primary phone #. When a patient calls in refills on the IVR, the patient enters the last 4-digits of this phone #.

Patient's preferred method of contact.



Preferred language selection - English or Spanish. Setting will change language on labels & patient education.

Vet species drop-down box to use when adding a pet.

These 4 button options are available on every tab of the Patient Profile.

Add important patient notes to be referenced on all Rxs filled.

A new Rx can be started from the Patient Profile.

Deactivate button to use for a deceased patient (after the date of death has been entered on Tab 8)

Outbound Texting

To set a patient up for Outbound Texting:

- In the Additional Contact Information section, choose Alt 1 from the Phone Numbers drop-down menu and enter the patient's cell phone number as Alt 1.
- In the Preferred Contact drop-down men, choose Text.
- Click Patient Notes and add a note stating that the patient opted into this service.

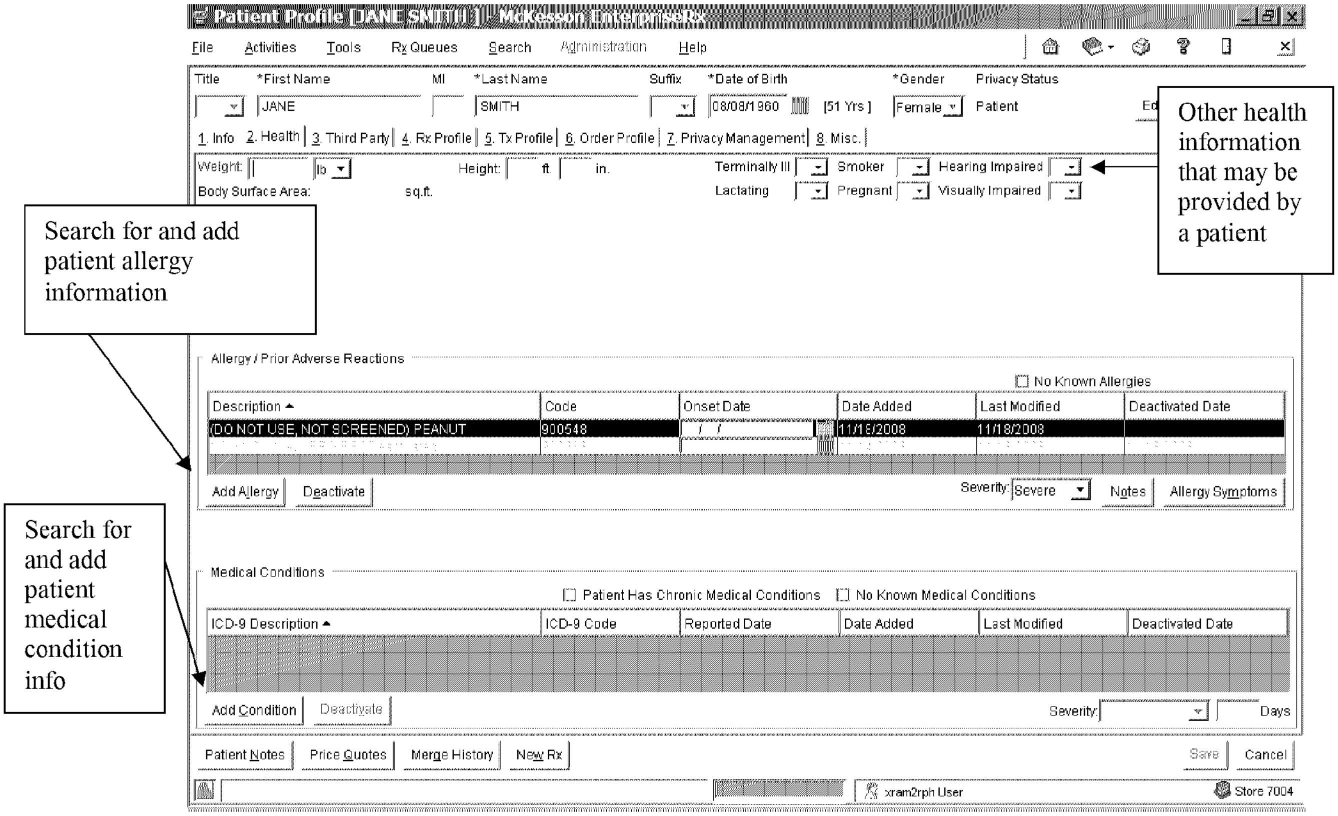
Patient contact info

- When a patient calls in a refill on the IVR system, the phone number they enter must match the number in the primary *Phone* field.

Format rules

- Data consistency is part of keeping the integrity and accuracy of the patient profiles and reducing potential of introducing a duplicate patient profile to the system
- We use postal code rules – located on the Pharmacy page @ *Pharmacy Operations > Quick References > Patient and Prescriber Profiles > Profile Name & Address Standards*.

<u>Tab 2: Health</u>



Searching for and Adding Allergies

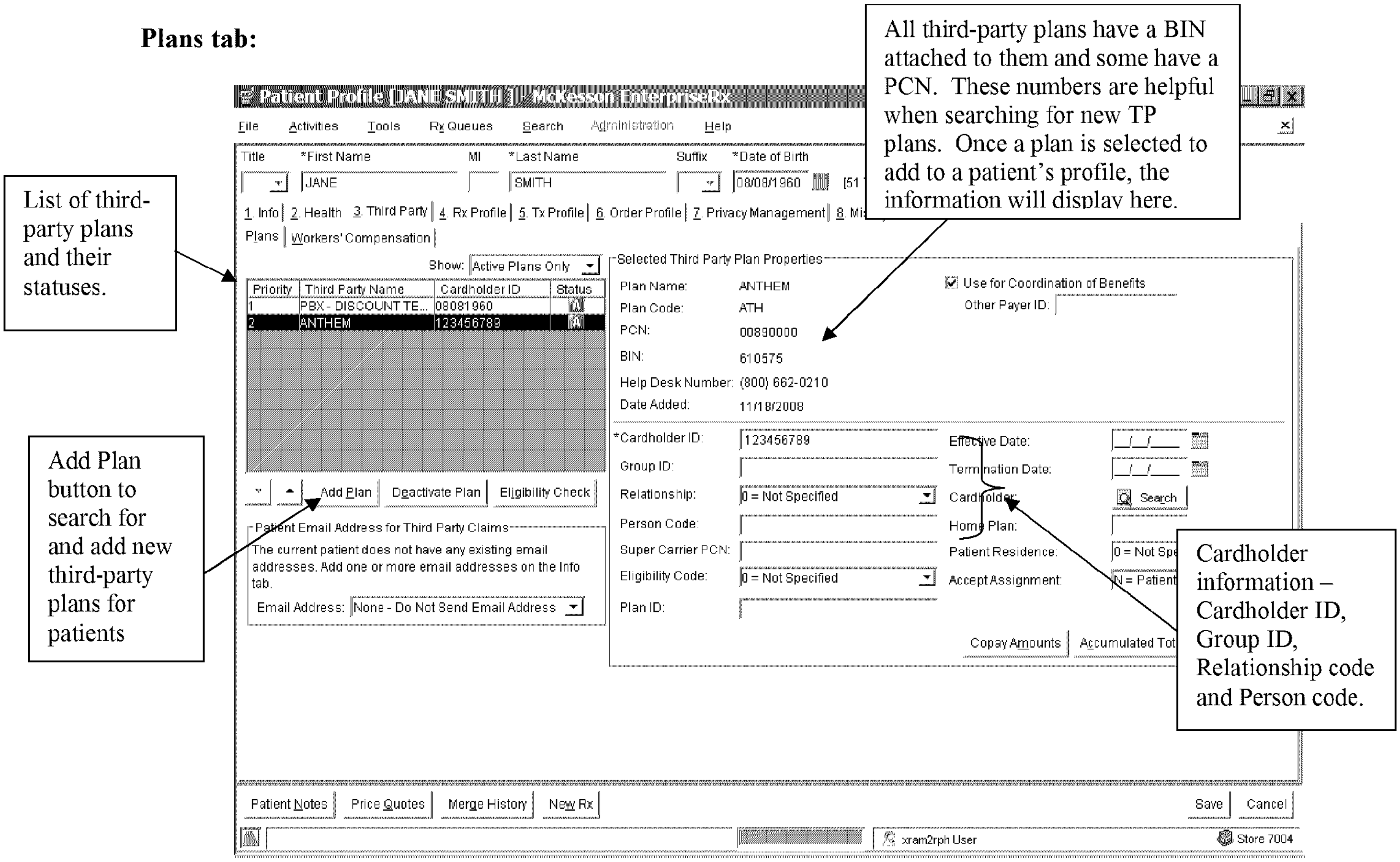
- Refer to procedures in the Quick References section on the Pharmacy page
    - adding an inactive ingredient allergy correctly is extremely important – you must perform the steps correctly to initiate a DUR
    - Review steps for adding that a patient's allergy info is not known.
- **Pharmacists must verify the allergy information Technicians/Interns enter to ensure it has been entered correctly**.

Searching for and Adding Medical Conditions

- Search by:
    - name of the condition
    - Diagnosis code for the condition or
    - Name of the drug they are taking for the condition.
- **The Pharmacist must verify medical condition information Technicians/Interns enter to ensure it has been entered correctly.**

Tab 3: Third Party
There are 2 tabs within the Third Party tab, Plans and Workers' Compensation.

Plans tab:

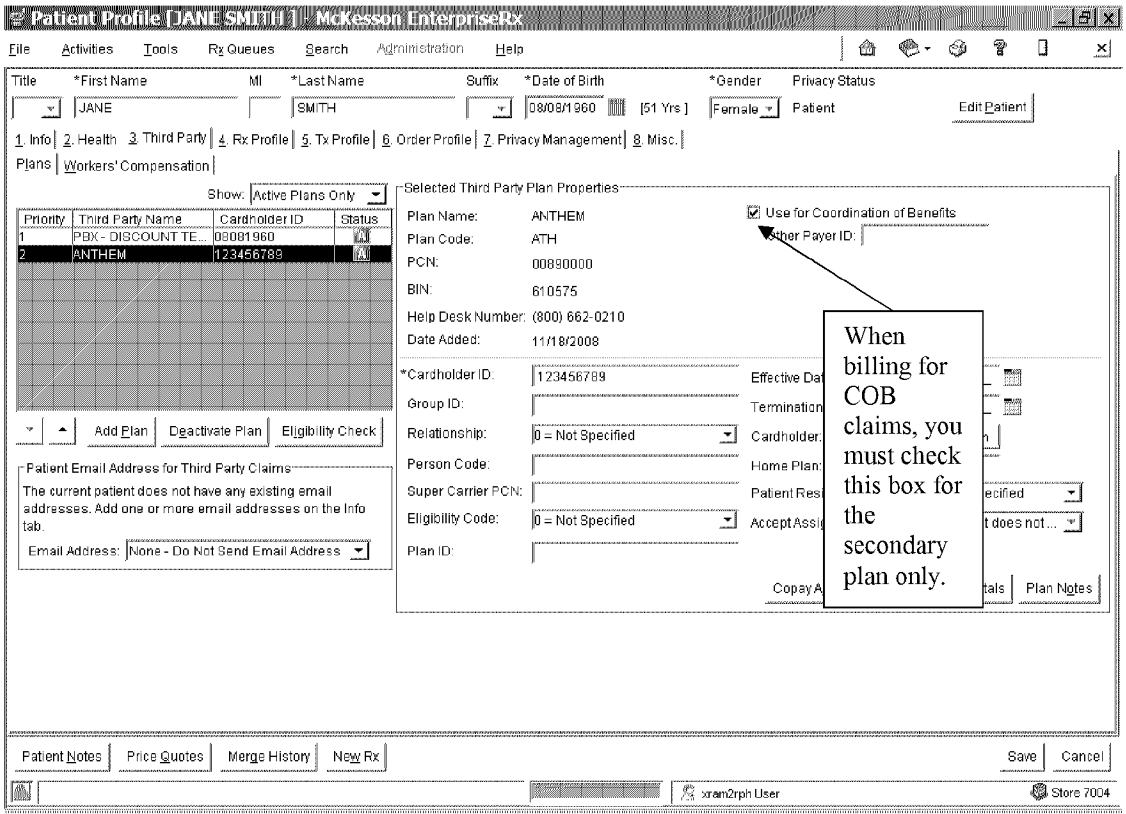


Adding third-party information to a patient's profile

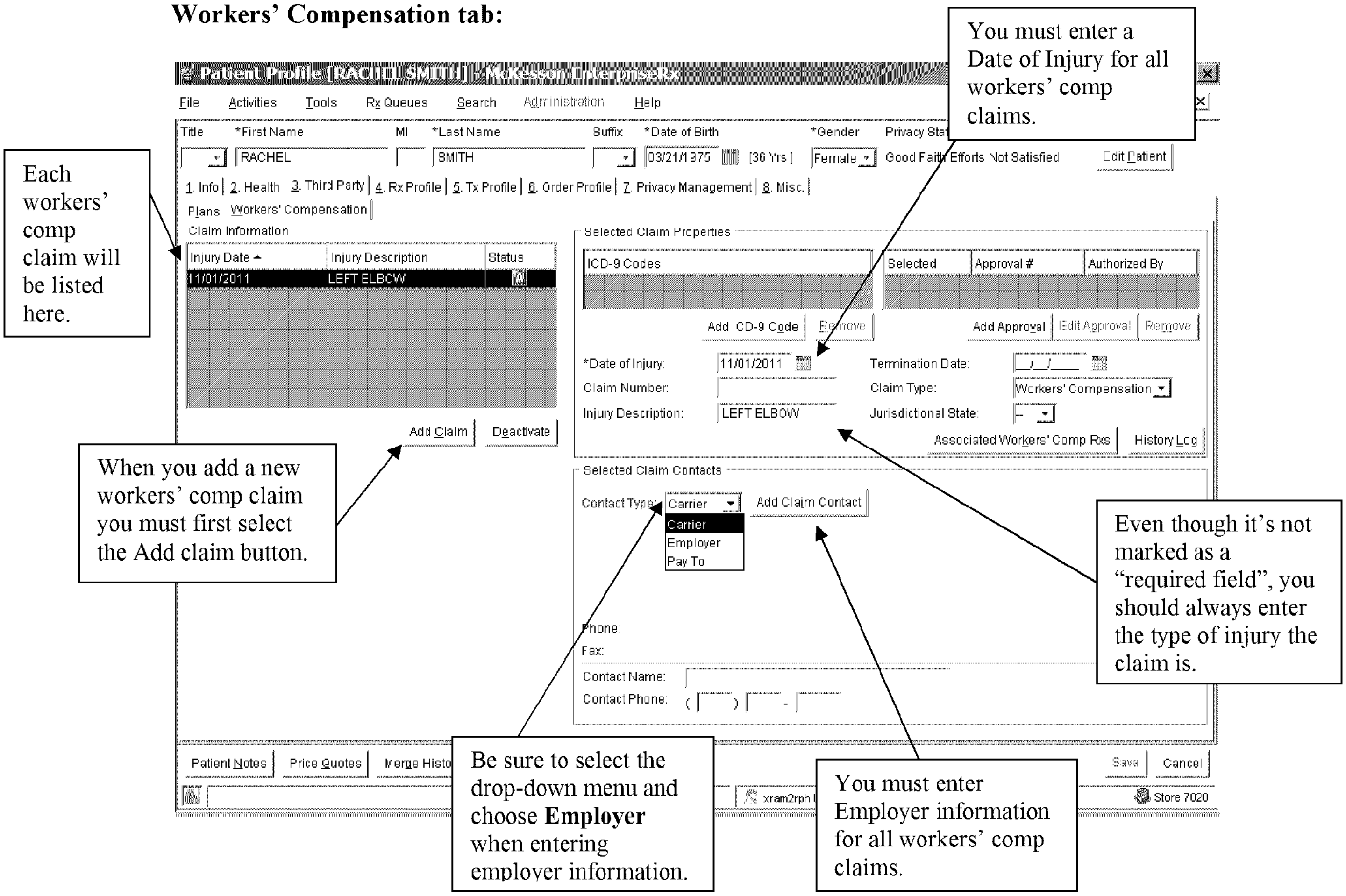
- Review the steps for setting up a third party plan in a patient's profile.
- Ensure to use the Eligibility Check tool (covered in Module 9)
- It's best to search by BIN & PCN if available

Billing more than one third party/coupon

- When split billing or using Coordination of Benefits (COB) billing, you need to check the Use for COB check box on the secondary insurance.



Workers' Compensation tab:



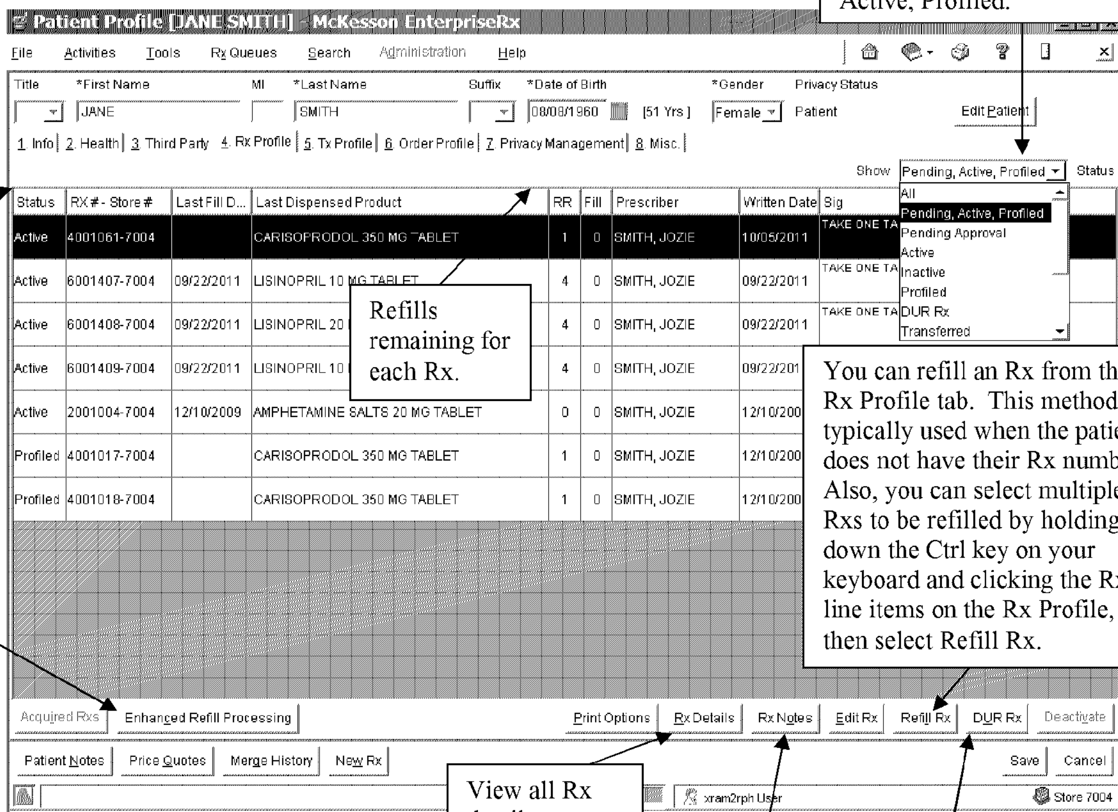
General steps to process a worker's compensation claim

- Setting up and processing can be done from workflow:
  1. In Reception,
     a. Add Worker's Comp insurance to patient profile
     b. Add claim and injury information to patient profile
  2. In Data Entry
     a. Complete data entry
     b. Associate the claim to the injury (the system will automatically take you to the screen to do this, but you can also access it through the Additional Information screen)

Tab 4: Rx Profile

The Rx Profile screen can be filtered by status of the Rx. The system defaults the filter to Pending, Active, Profiled.

Double click on any of the column headings to filter the items listed.



Refills remaining for each Rx.

You can refill an Rx from the Rx Profile tab. This method is typically used when the patient does not have their Rx number. Also, you can select multiple Rxs to be refilled by holding down the Ctrl key on your keyboard and clicking the Rx line items on the Rx Profile, then select Refill Rx.

Set up Rxs for Enhanced Refill Processing (ERP) to be auto-filled each month.

View all Rx details including the scanned in Hard Copy image

View or add notes pertaining to a specific Rx

Add a DUR Rx from the Rx Profile - allows you to add a patient's medication that was filled by another pharmacy or OTC med so that it can go through the DUR process

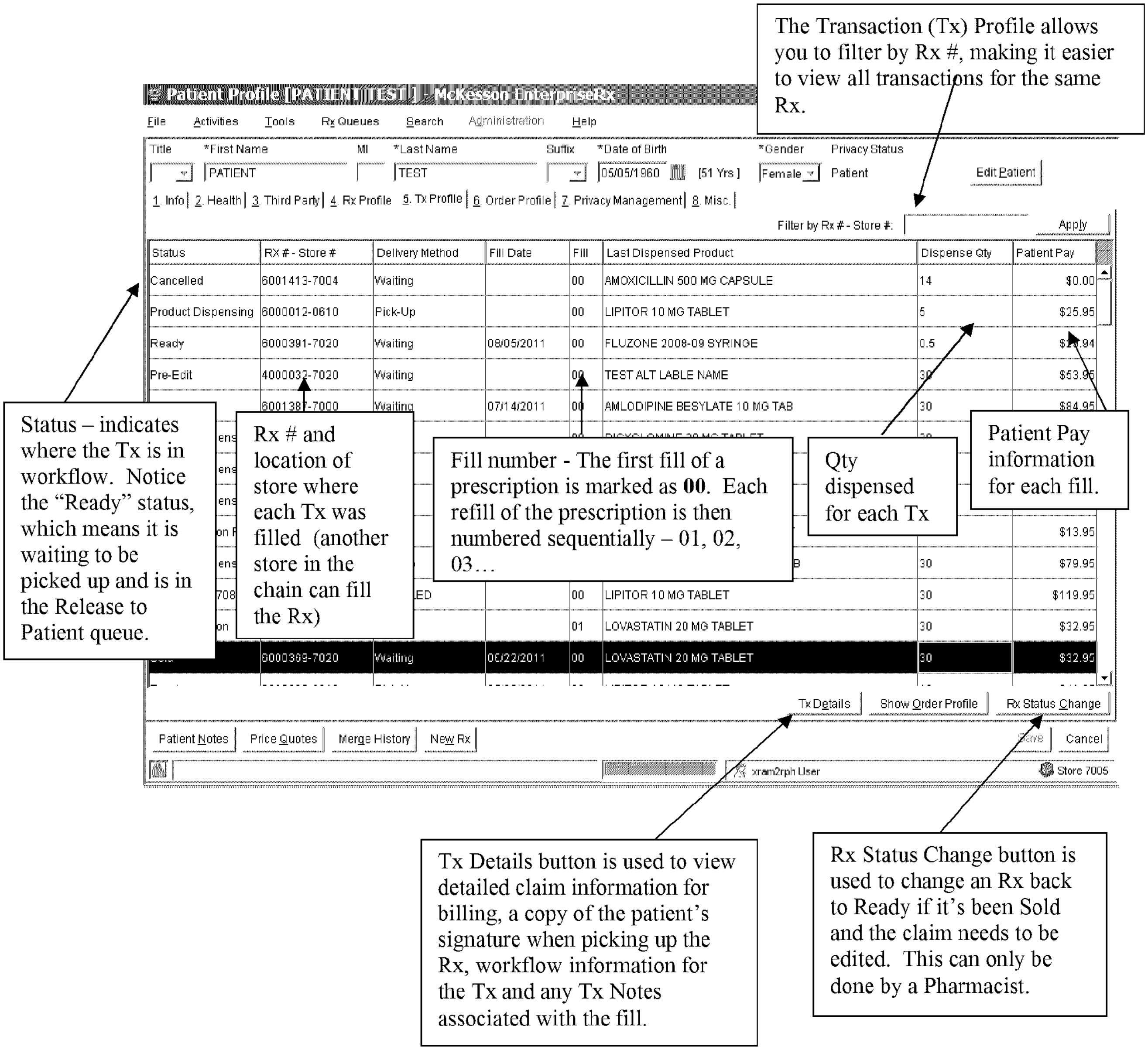
Key points

- The Rx Profile tab defaults to showing Pending, Active and Profiled.
- Use the filter functionality to narrow to what you want to see.
- Sort columns by clicking on the column titles.

Rx Status Types
Review the different Rx statuses and their descriptions.

Status	Description
Pending Approval	Prescriptions waiting for approval in Contact Manager.
Active	Prescriptions available to be filled. Note: Prescriptions that are expired still show up with a status of Active.
Inactive	Prescriptions that have been deactivated.
Profiled	Prescriptions that have never been filled, but are active and available to fill.
DUR Rx	Record of a prescription filled by another pharmacy (not a Publix pharmacy) or OTC medication.
Transferred	Prescriptions transferred between Publix pharmacies or to pharmacies outside of Publix.
Inactive Profiled	Prescriptions that have never been filled and were deactivated.
Inactive DUR RX	A DUR Rx record that was deactivated because the patient no longer uses the medication.
Cancelled	Prescriptions entered into the system and then cancelled before the first fill was completed.
Denied	New prescription request sent to a prescriber and was denied of being filled.
Divested	We do not use this status.

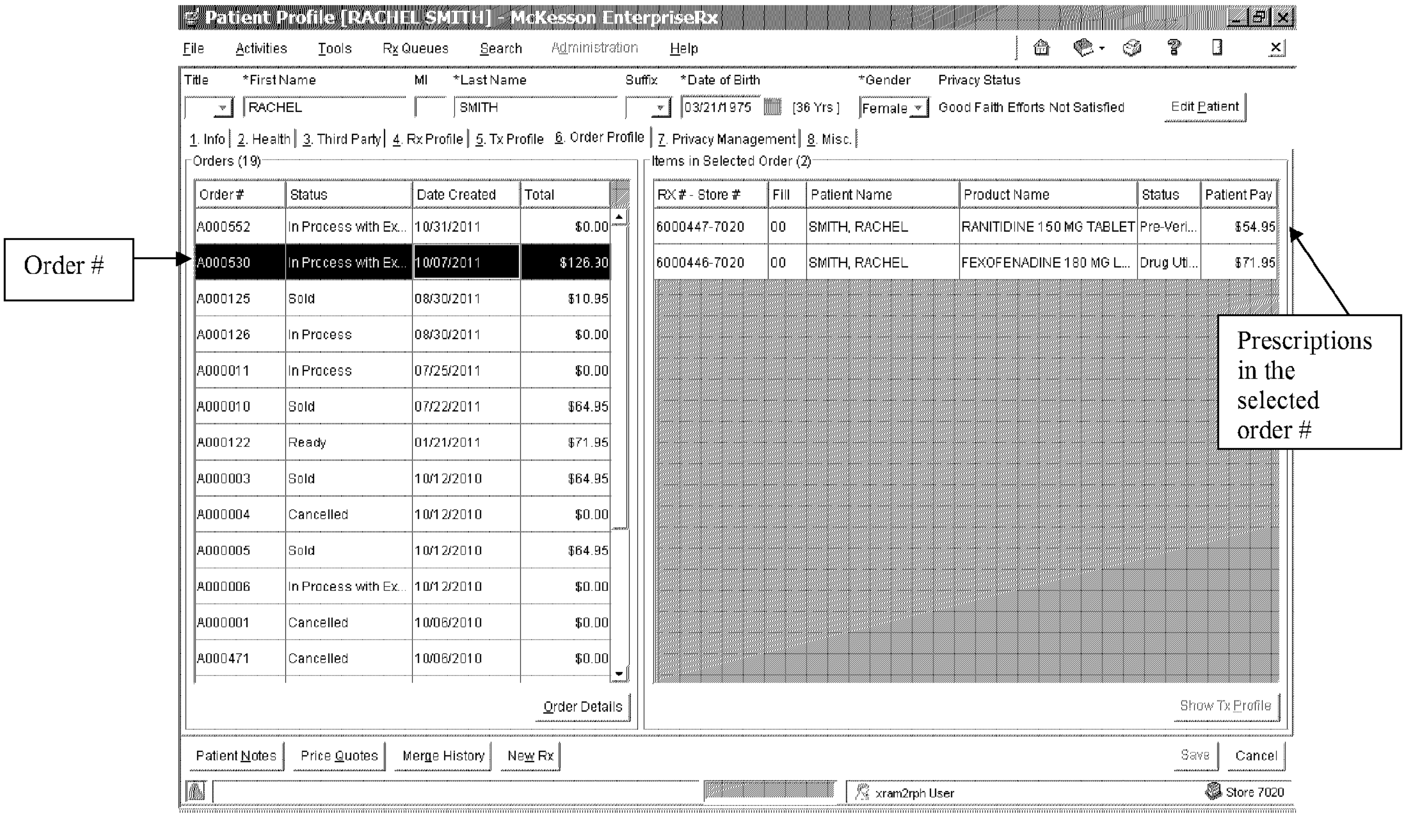
Tab 5: Tx Profile



Key points

- Get from a particular Rx on the Rx Profile tab to the transactions (Txs) for that Rx
  - within a few clicks by clicking on Rx Details and then Tx Details, or
  - by going directly to the Tx Tab and entering the Rx# in the filter field
- Sort columns by clicking on the column titles.

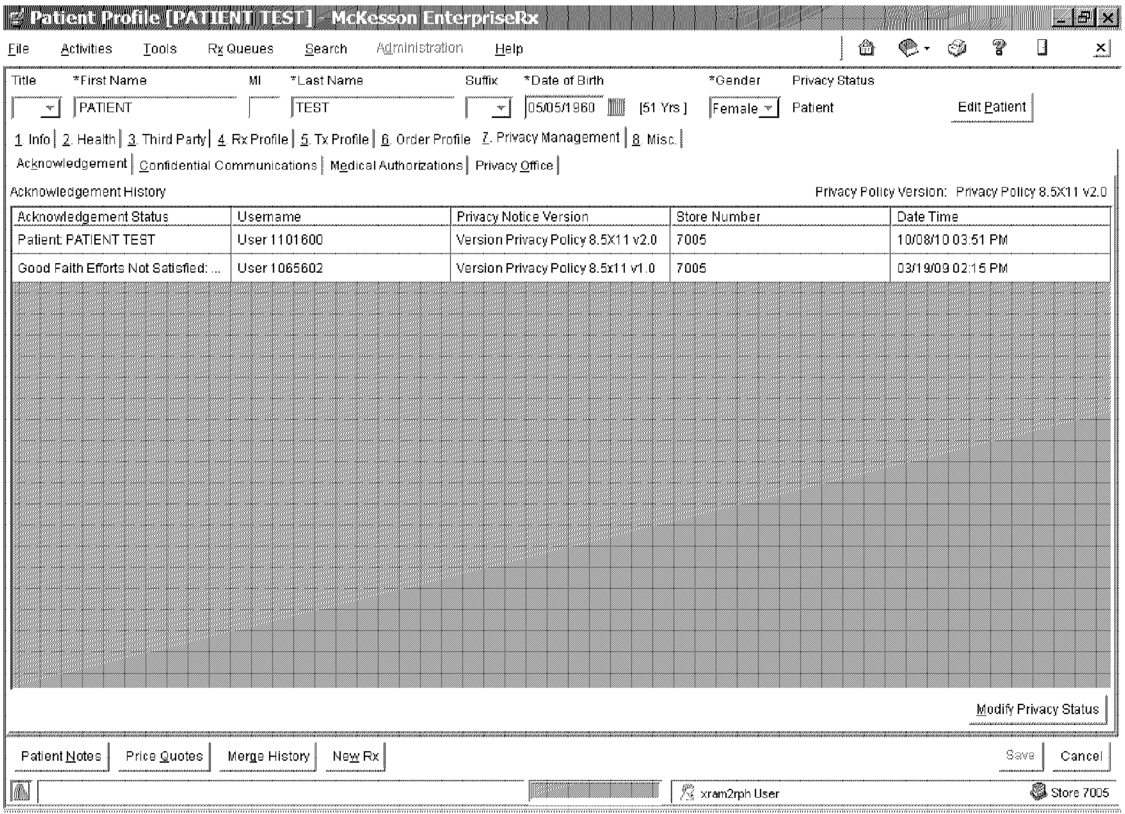
Tab 6: Order Profile



Key points

- Explain how the screen provides information on which prescriptions are in each order. The left side of the screen shows all orders within the selected patient's profile. The right side of the screen shows all prescriptions in the selected order

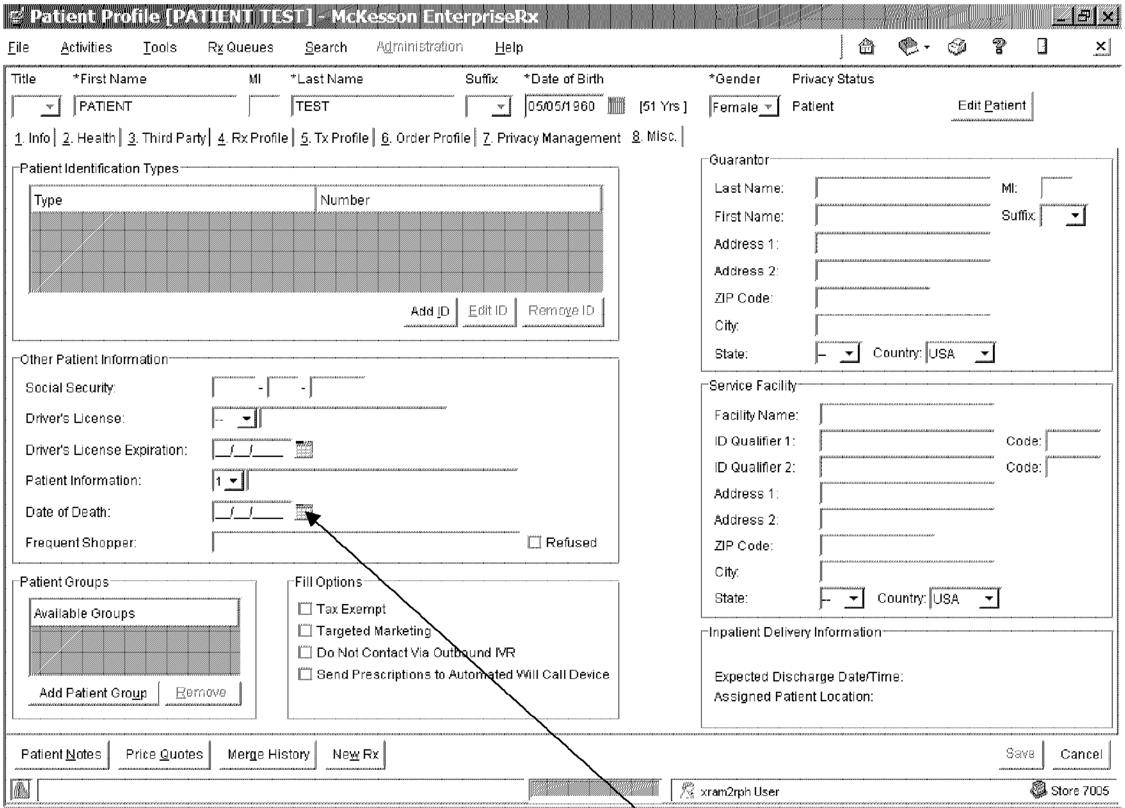
Tab 7: Privacy Management



Review each of the Privacy Management tabs below.

Tab	Contents
Acknowledgement	Contains the history of the patient's acknowledgement of our Privacy policy.
Confidential Communications	Where you mark the profile if: • the patient doesn't want their prescriptions filled anywhere but their home store • the patient does not want to be contacted by phone or address, and • where patient's can limit who can pick up their Rxs
Medical Authorizations	Where you can add and scan in any medical authorizations brought in by the patient.
Privacy Office	Contains the checkbox for an emancipated minor.

Tab 8: Misc.



If a patient is deceased, a family member may give you their date of death to include in our records. Once you have entered the date, be sure to go to the Info tab and deactivate the patient's profile.

Patient Merge

- It is essential that all of our patients' information exists in only one record. Multiple patient records (profiles) create many potential problems including:
  - Increased chance a drug allergy or drug interaction will be missed.
  - Drug history and third-party information may be entered correctly on only one of the records.
  - "Missing prescriptions" due to only one of the records immediately visible to the local pharmacy
  - Multiple (wrong) addresses and phone numbers impairing our ability to send patients letters, do outbound calling, etc.
  - Inbound PPI communications will not identify the correct patient.
  - Refer to the Patient Merge document on the Pharmacy page of Publix Connection under the *Quick References* link.

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name Prescriber Profile

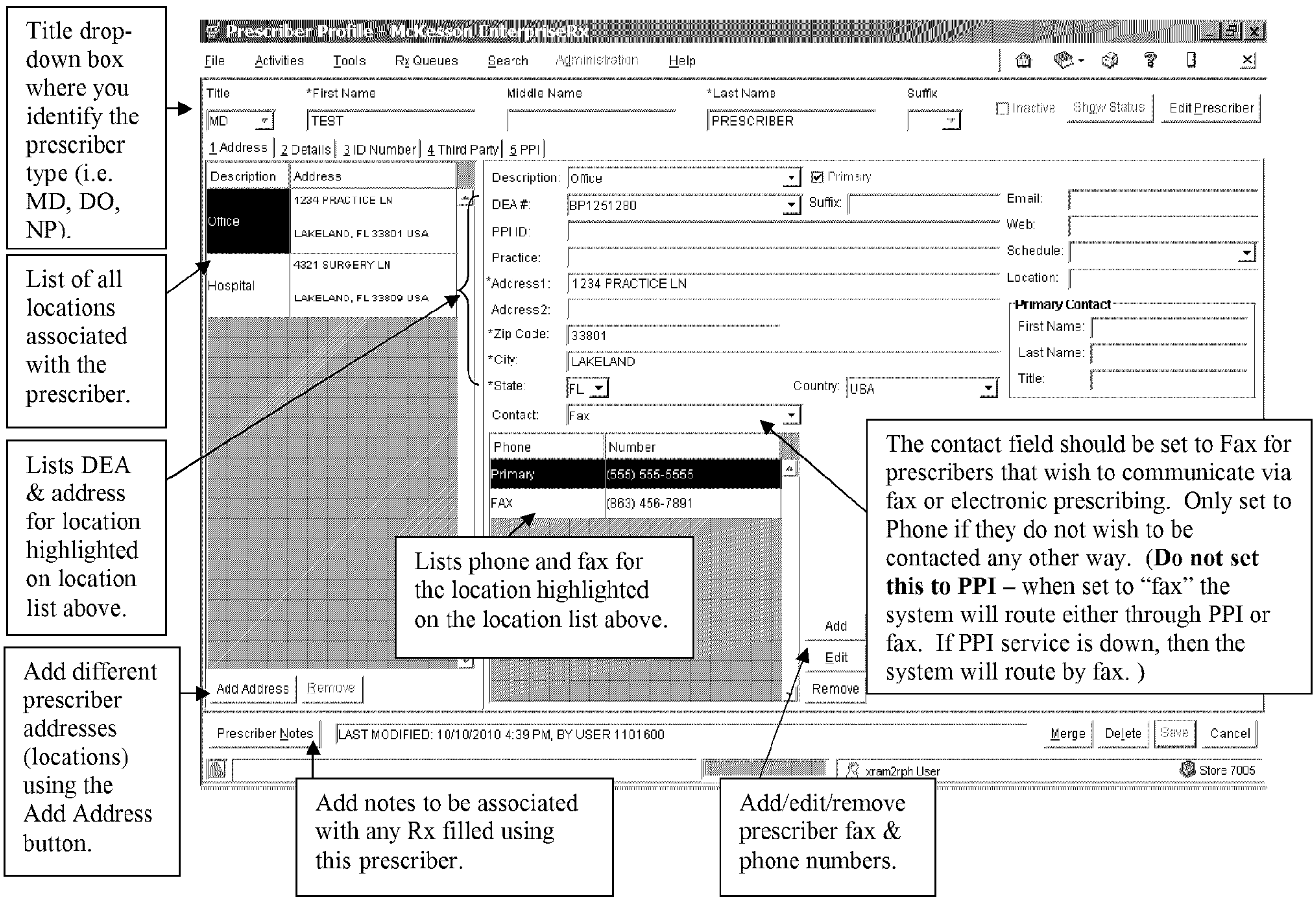
Course Description a detail dive into the prescriber profile

Overview
Key concepts:
- one profile for each prescriber, shared by the whole company – centralized pharmacy system
- information in profile important for billing properly
- information in profile incorporated into controlled substance reporting (as required by state)
- electronic prescribing works based on information set up in the profile
- integrity and accuracy of each profile is imperative for regulatory compliance and proper billing
- each pharmacist is responsible for accuracy and integrity of data in the system!

Detail Dive into the Prescriber Profile

Below are screen shots with key components of each tab within the prescriber profile..

Tab 1: Address



Multiple prescriber addresses

- A prescriber profile should contain address information for each office location for the prescriber.
- The office location selected must match the office location identified on the hard copy prescription.

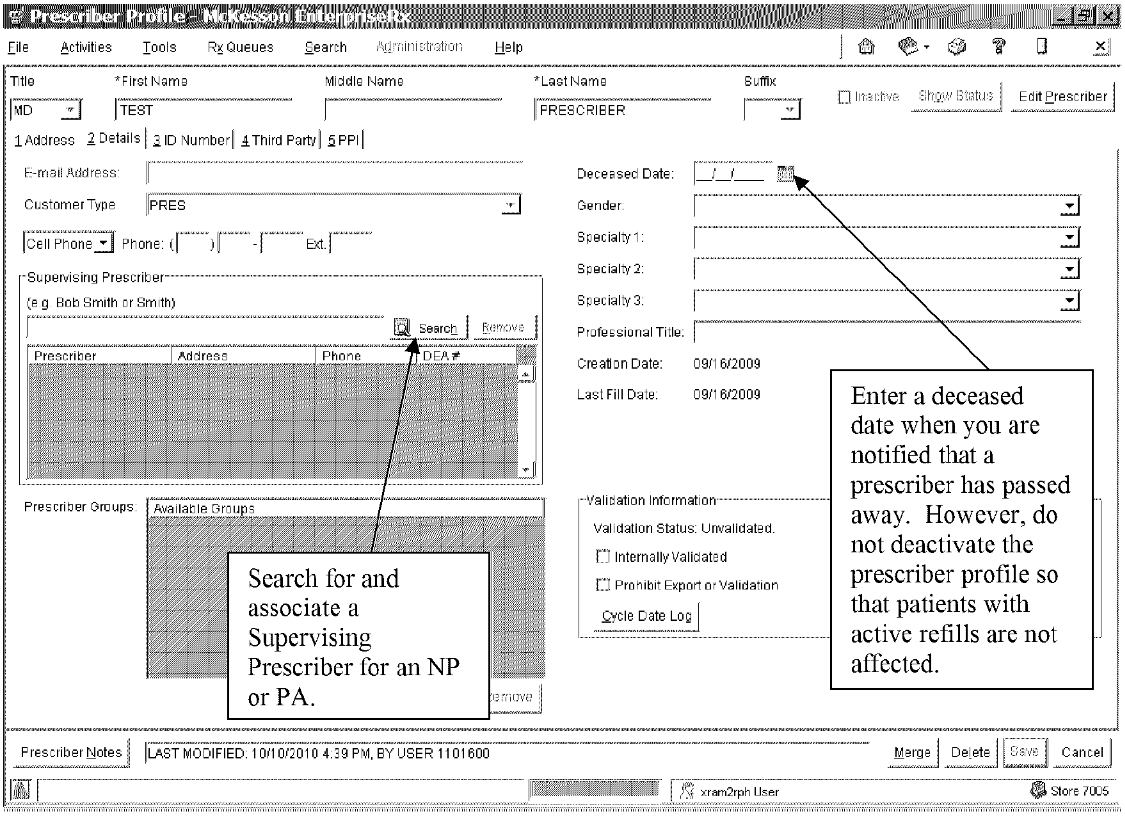
Format rules

- Data consistency is part of keeping the integrity and accuracy of the prescriber profiles and reducing potential of introducing a duplicate prescriber profile to the system.
- We use postal code rules – located on the Pharmacy page of Publix Connection under the *Quick References* link.

The Contact field

- This should always be set to Fax! (Even for prescribers that e-prescribe.)

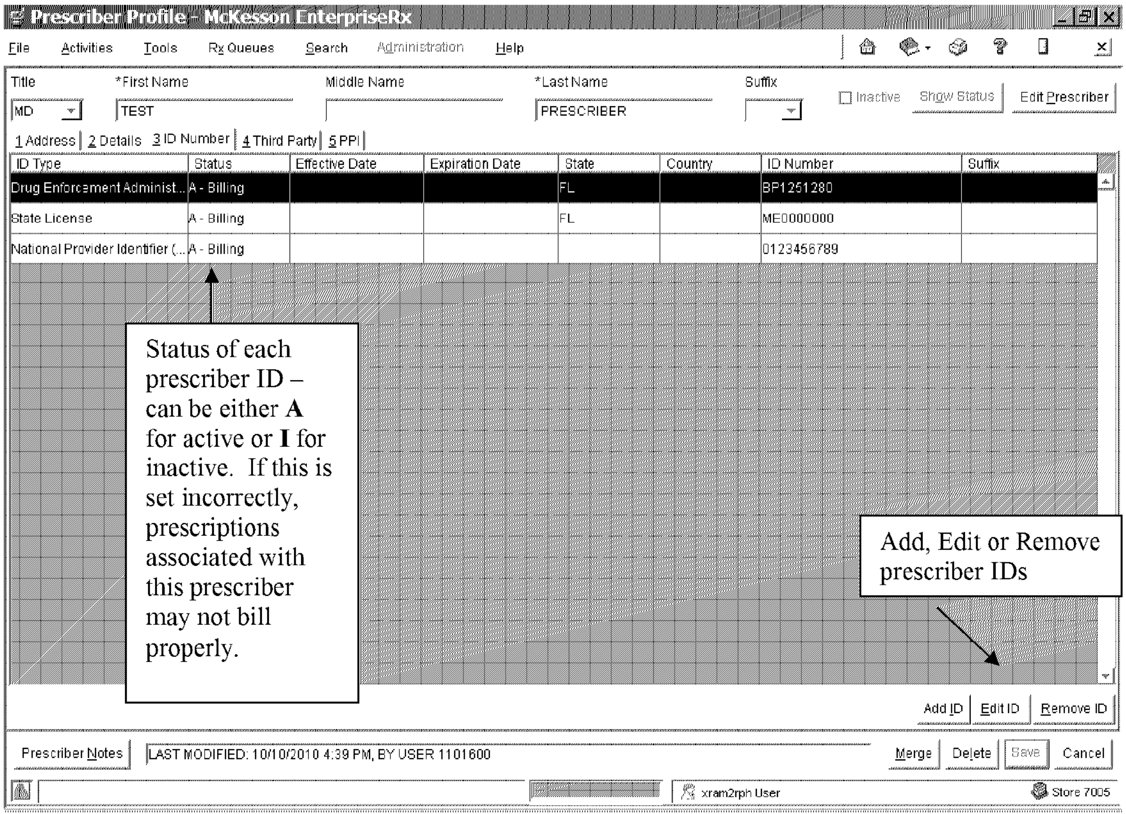
Tab 2: Details



Setting up a NP (Nurse Practitioner) and PA (Physicians Assistant)

1. Set up a separate profile for each NP and PA, and then
2. associate them with a Supervising Prescriber (which must be a doctor with a valid license and DEA# already set up in our system).

Tab 3: ID Number



ID numbers for NPs and PAs

- NPs and PAs do not have DEA#s (they cannot prescribe controlled substances); however, they must have a valid NPI #.

Tab 4: Third-Party – not used by the pharmacy

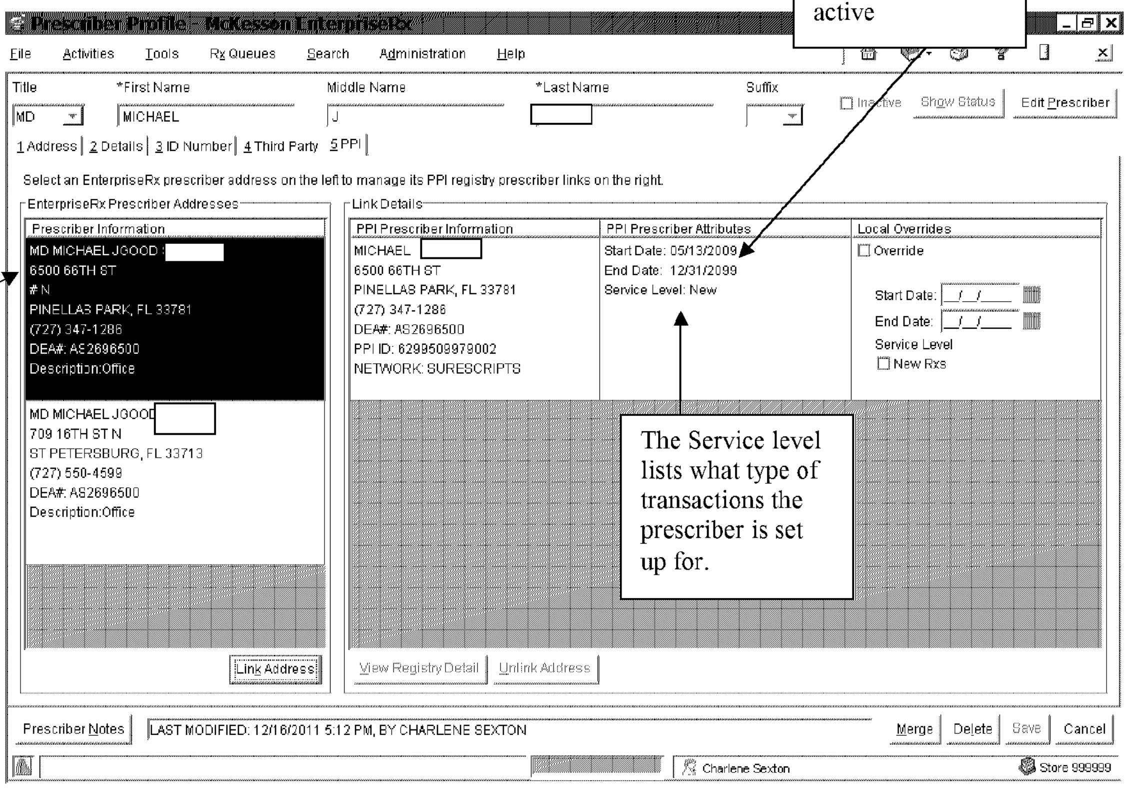
Tab 5: PPI

PPI = Electronic prescribing

- Prescribers with electronic prescribing software in their offices can electronically send new prescriptions directly to our pharmacy system.
- We can send refill renewal requests electronically to the prescriber's system.
- The prescribers can then approve or deny the refill renewal request and send that directly to our pharmacy system.

For electronic prescribing to work properly, we have to set up certain fields in the prescriber profile correctly.

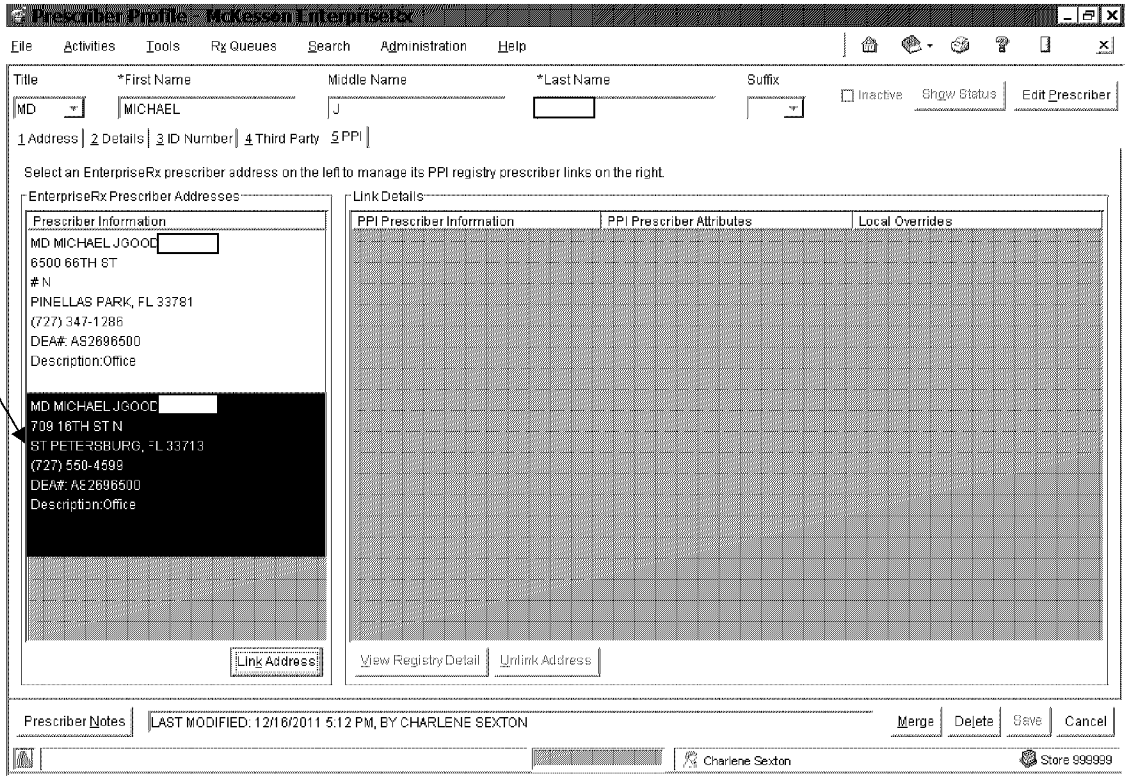
Dates to verify that Prescriber is active



Prescriber with 2 addresses. 1st address is linked for e-prescribing (you can tell this because information is populated to the right.)

The Service level lists what type of transactions the prescriber is set up for.

2nd address is not linked to e-prescribing (you can tell this because information is not populated to the right.) In this scenario you would call the Pharmacy Support Desk so they could link the prescriber.



Course Name Drug Profiles

Course Description a detail dive into the product and inventory profiles

<u>Overview</u>
Key concepts:

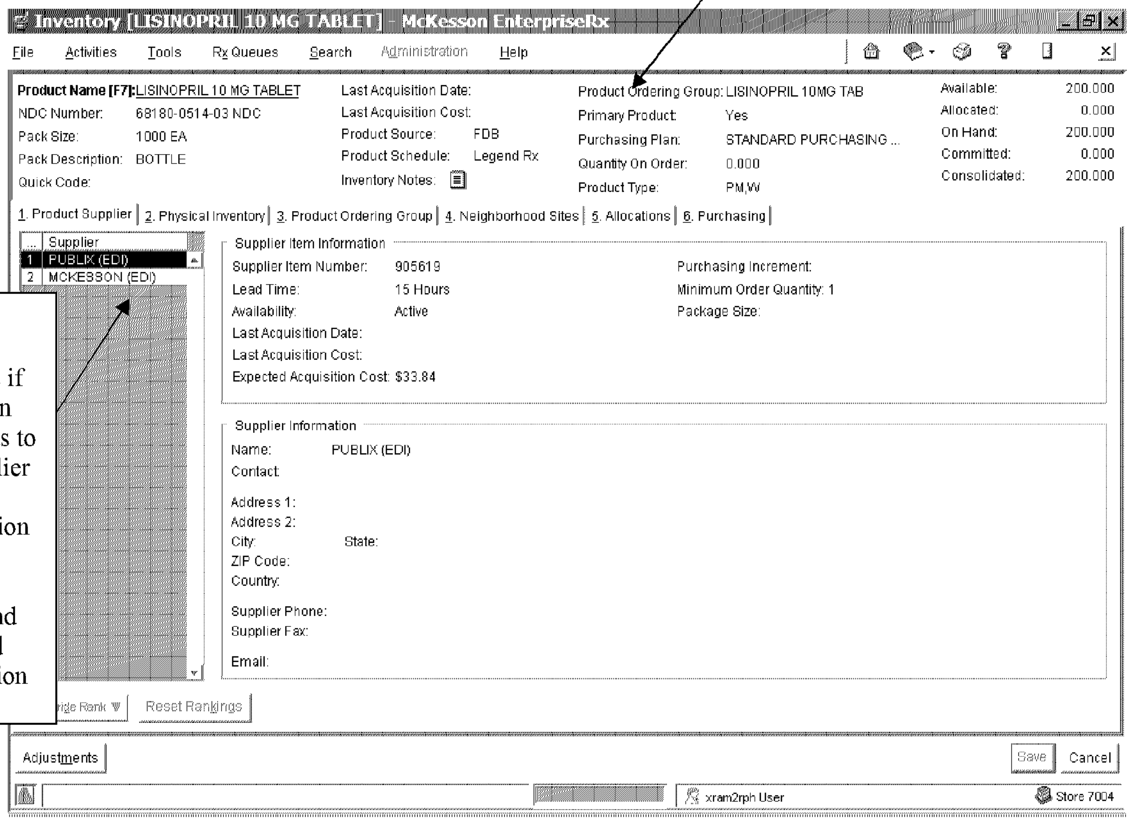
- One Product Profile for each drug (by NDC) is shared by the whole company and maintained by Pharmacy Operations. The Product Profile contains:
  - specifics on the drug (form, SIG language, pack size, etc.)
  - pill image
  - link to the Inventory Profile
- Each pharmacy has an Inventory Profile for any products that have been ordered at that location. The Inventory Profile contains:
  - supplier information
  - acquisition cost
  - a field to add a drug to a special group (e.g., fast movers)
  - a screen to view products linked by GCN (Product Ordering Group or POG)
  - a view into inventory levels at neighborhood locations
  - identification of where inventory is allocated among the various inventory statuses (e.g., available, on-hand)
  - fields to manage order parameters – Override Min/Max values
  - a field to make inventory adjustments and select a reason for each adjustment

Detail Dive into the Inventory Profile

Below are screen shots with key components of each tab within the inventory profile.

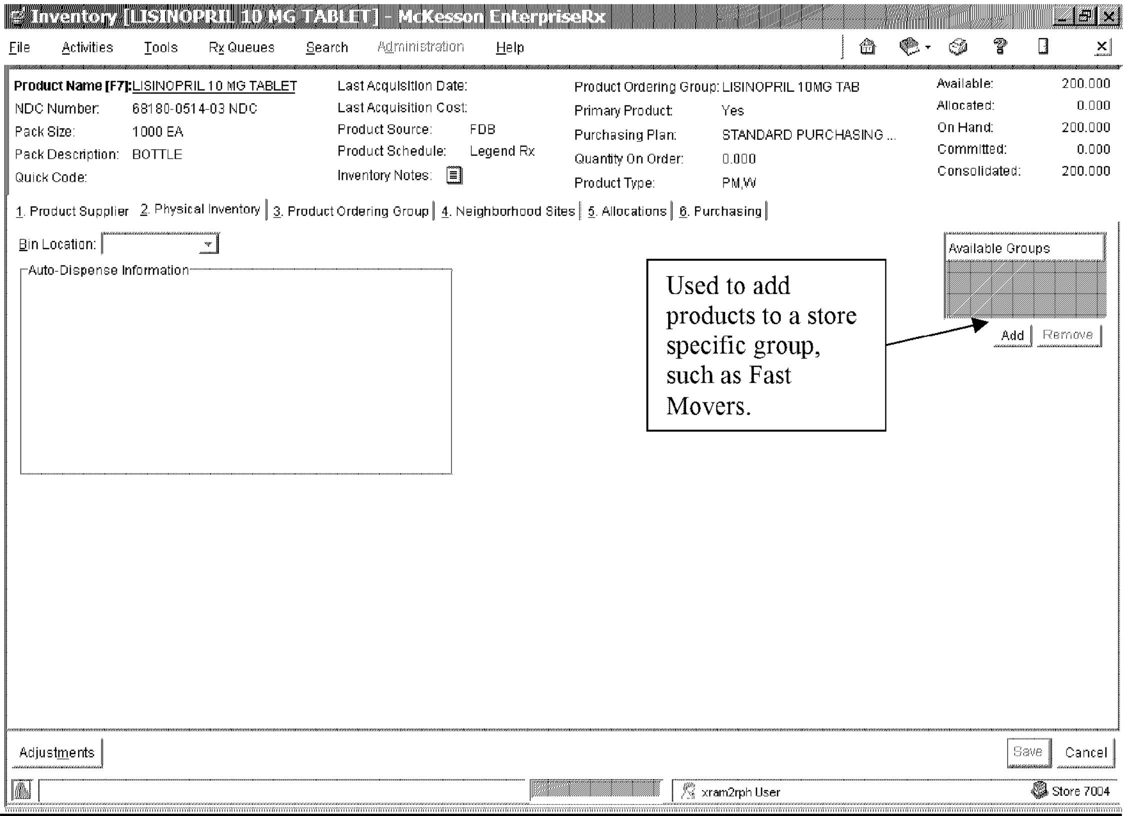
Tab 1: Product Supplier

All of the product information on the top of the screen is static and viewable from each Inventory tab.



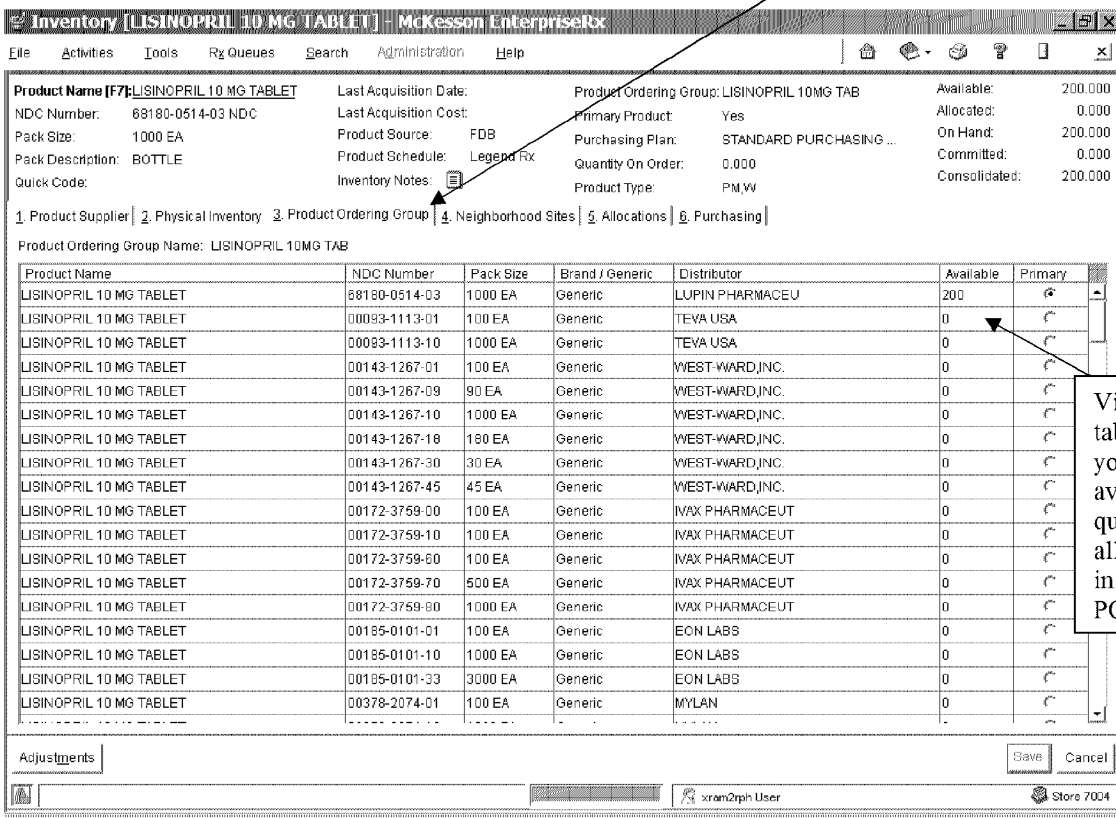
Toggle between suppliers if more than one exists to see supplier specific information such as supplier item # and Expected Acquisition Cost.

Tab 2: Physical Inventory



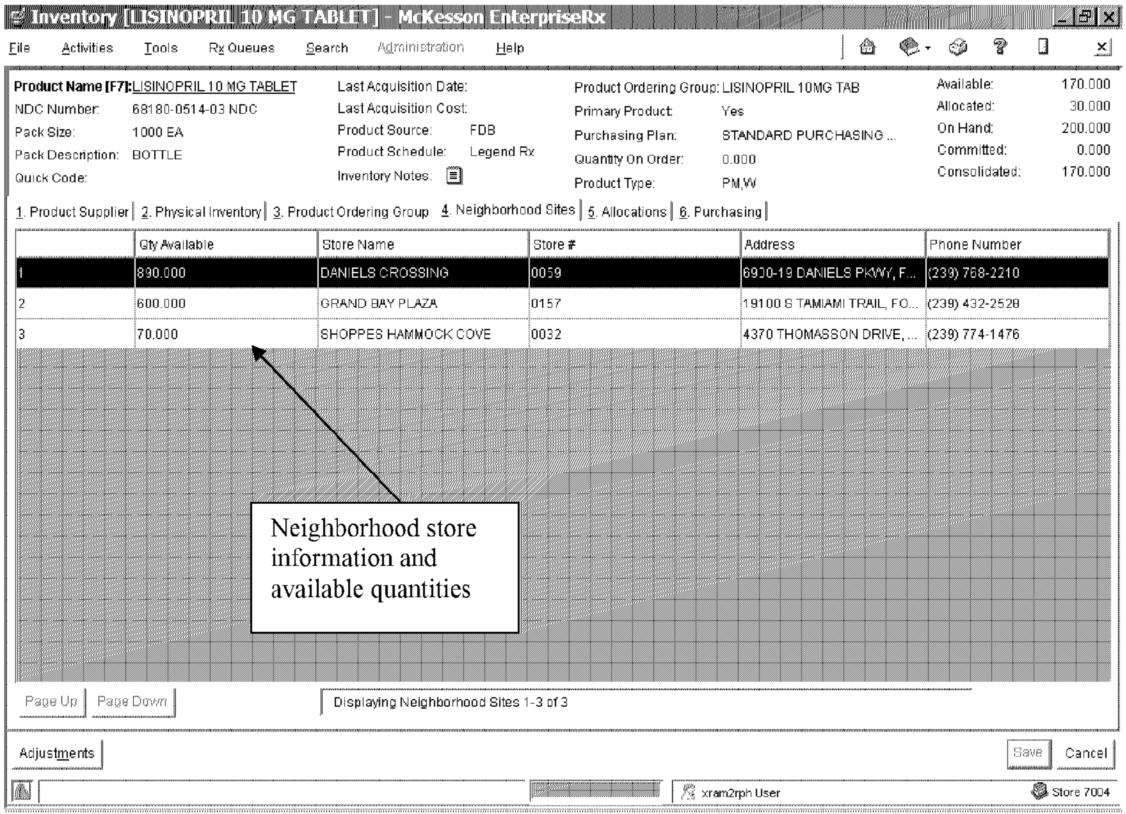
Tab 3: Product Ordering Group

This tab lists all products that are in the same Product Ordering Group (POG). A POG is a list of products all having the same GCN, grouped together with a primary product for ordering purposes. The primary product will always be at the top of the list. Only the primary product will be ordered, no matter what product is selected in workflow.



Viewing this tab allows you to see available quantities for all products in the same POG.

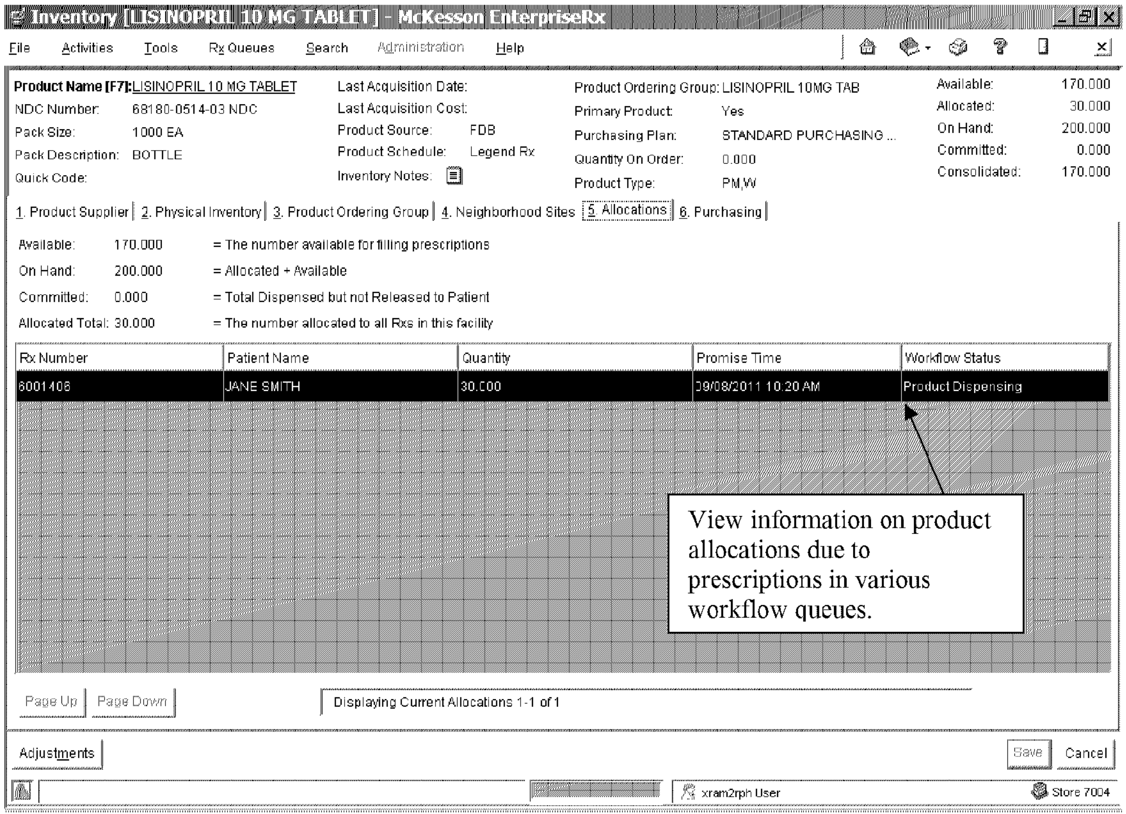
Tab 4: Neighborhood Sites



About neighborhood sites

- Neighborhood sites are other pharmacy locations that are geographically close.
- A neighborhood location is considered close enough that you would ask or expect a customer to drive there to pick up a prescription.
- If low/out of stock, locate drugs in stock at neighboring pharmacy.

Tab 5: Allocations



Understanding inventory statuses

The following table will help you understand inventory statuses as identified on the Inventory screen, as well as throughout workflow:

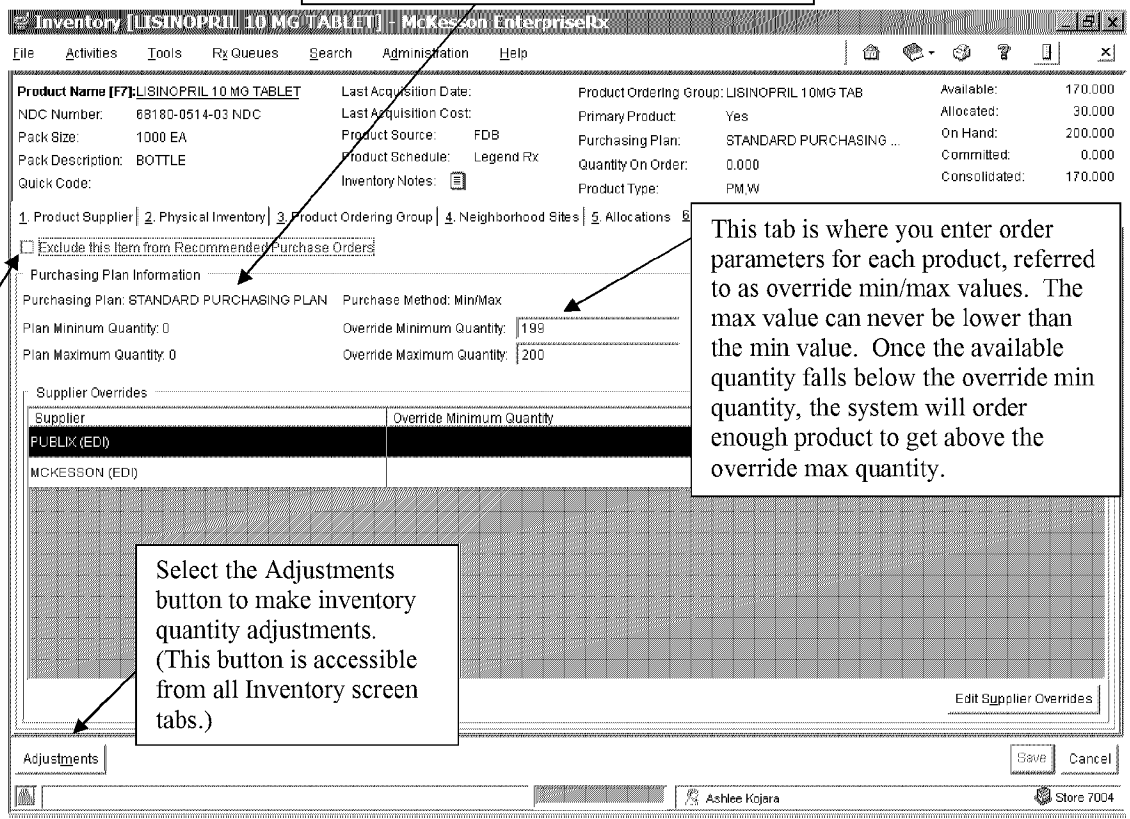
	Workflow Queue			
Inventory Status	**Before Data Entry**	**Data Entry Completed**	**Product Dispensing Completed**	**Sold**
Available	30	**0**	0	0
Allocated	0	**30**	**0**	0
Committed	0	0	**30**	**0**
On-hand	30	**30**	**0**	0

Note: There's also a ***Consolidated*** inventory status which is the combined *On Hand* inventory for all products in a specific Product Ordering Group (POG). The product will not reorder until the consolidated quantity falls below the Min value (discussed on next page).

Tab 6: Purchasing

All products are attached to a Standard Purchasing Plan with a defaulted min/max of 0/0.

The Exclude this item from Recommended Purchase Orders checkbox can be selected, and is sometimes pre-selected by Corporate to keep items from ordering.

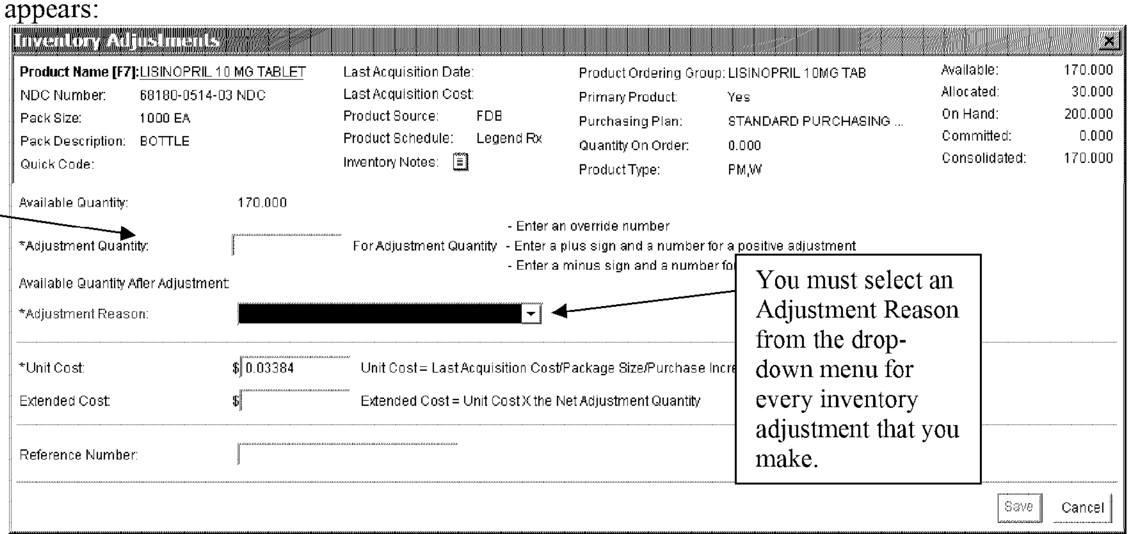


This tab is where you enter order parameters for each product, referred to as override min/max values. The max value can never be lower than the min value. Once the available quantity falls below the override min quantity, the system will order enough product to get above the override max quantity.

Select the Adjustments button to make inventory quantity adjustments. (This button is accessible from all Inventory screen tabs.)

Once you select the Adjustments button, the below Inventory Adjustments screen appears:

Enter Adjustment Quantity here. This can be a positive or negative adjustment, or an override to a specific number.



You must select an Adjustment Reason from the drop-down menu for every inventory adjustment that you make.

Tips

- Since all products are set up on a Standard Purchasing Plan, product will order when the on-hand goes below 0. This is regardless of whether you have Override Min/Max values of blank or 0.
- Some Override Min/Max values are automatically set by Pharmacy Operations based on historical dispensing data and future dispensing expectations (for example, for patient's on ERP).
    - Central Inventory Management currently excludes the following product categories:
        1. OTC's
        2. Products with little or no historical usage in your pharmacy

- When manually setting Override Min/Max values, consider how often the product will be used. If it's a heavily dispensed product, a bigger difference between or Override Min and Override Max will provide you a larger shipment of product at one time instead of 1 bottle at a time. However, the goal is to keep generics at no more than two week's supply and brands even less.

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Module P8:
Compliance Courses

Module Description:
regulations and the importance of compliance to these regulations

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Course Name	Course Description	Type	Length	Facilitator
Patient Safety	importance of patient safety, types of errors, identifying root causes, prevention, and responding to customers	CBT	1 hr	Learning
Bloodborne Pathogens and Biomedical Waste	Definition of bloodborne pathogens, general information regarding bloodborne diseases, overview of the Exposure Control Plan, universal precautions and state specific regulations.	CBT	45 min	
iPLEDGE	details about the iPLEDGE program as required by the FDA	CBT	20 min	
Hazardous Waste Policy	Publix policy on disposing of hazardous waste according to EPA guidelines	ILT	30 min	Training Location RPh

Instructions

- All of the courses in the list above must be taken before moving on to any other courses.
- For the CBT programs, log into Learning through Passport on your store's training workstation. Locate each of the Compliance CBTs listed above on your To Do list and click the Start button.

Legend
CBT – Computer based training
ILT – Instructor led training

Course Name Hazardous Waste Policy

Course Description Publix policy on disposing of hazardous waste according to EPA guidelines

The Environmental Protection Agency (EPA) has important guidelines for the identification, handling and disposal of hazardous waste. It's important for you to follow these guidelines to not only protect our environment, but also to reduce the risk of costly fines.

Hazardous Waste Overview

Many prescription items are known hazardous wastes when disposed, including warfarin, tretinoin, benzoyl peroxide, lindane, selenium sulfide, and others. Unfortunately, there is no complete list of hazardous products available to us, therefore, Publix and its employees are not in a position to make a determination regarding a product's hazardous waste status. All unsalable pharmaceuticals are returned to our reverse distribution company (CLS/Medturn) for handling. If any pharmaceuticals cannot be returned to the reverse distributor (e.g., dropped or crushed pills), such damaged pharmaceuticals must be placed into the plastic hazardous waste container stored in the Pharmacy. Pharmacies have an annual hazardous waste pick-up by a hazardous waste contractor.

The EPA has determined that empty stock bottles that contained warfarin (Jantoven, Coumadin, etc.) must be disposed of as hazardous waste, and not discarded in Publix's waste or recycling. Pharmacies have re-sealable hazardous waste bags which are used to store empty warfarin bottles and are picked up annually by a hazardous waste contractor.

Additionally, any prescription product returned by patients is considered hazardous waste since it has no returnable value. Publix pharmacies should never accept unused/expired medication from patients (unless it is recalled or a dispensing error occurred- which should be sent to our reverse distribution company).

Hazardous Waste Policy

No prescription product should ever be thrown in Publix's trash or poured down the sink by either a Publix employee or customer. Hazardous waste containers must be used to store any pharmaceuticals or other designated items (e.g., warfarin stock bottles) that cannot be returned to the reverse distributor (e.g., dropped or crushed pills).

Hazardous waste containers or bags should always be quarantined and stored away from your saleable product and kept tightly closed at all times. Hazardous waste containers or bags should never be emptied or thrown in Publix's regular trash or sink.

For detailed current policy information on disposal of unsaleable prescription products see Ch. 14 of the Pharmacy R&P Guide.

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Module P9:
References and Resources

Module Description:
overview of Publix Connection and many references and resources

Course Name	Course Description	Type	Facilitator
Publix Connection	access and use of the Pharmacy page, OWA, useforms and other links	ILT	Training Location RPh
Product-Related References	a review of our various product categories and REMS programs	ILT	
Clinical-Related References	a review of our drug reference resources and our clinical programs with related references	ILT	
Managed Care-Related References	a review of third-party billing tools and references	ILT	
Regulatory-related references	a review of regulatory references and resources	ILT	

Legend
ILT – Instructor-led training

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name Publix Connection

Course Description access and use of the Pharmacy page, OWA, useforms and other links

Publix Connection

You will access Publix Connection from the EnterpriseRx Home Page and find these useful tools which your trainer will review with you.

- Pharmacy page – online resources
- Store Quick Links – special links to certain tools (grouped together on Pharmacy page)
- Outlook Web Access (OWA) – email
- Contacts – important contact information (link at top left of Pharmacy page)

Note: Only access websites that are available from this page. You should never use any type of search engine, such as Google. This is against company policy.

Search Publix Connection to make finding documents and websites easier:

- use the Publix Connection search field to find a topic (try "Medicare")
- use the search field on the Useforms tab (*My Workplace > Useforms*) to find useforms (try "Pharmacy" in the search field)

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name Product-Related References

Course Description a review of our various product categories and REMS programs

Overview
This section includes key product-related information and references to ensure these products are managed effectively.

Pharmacy Products
- Pharmacy products include
  - prescription drugs
  - over-the-counter (OTC) drugs
  - medical supplies and devices
  - other specialty products
- Products that are dispensed as a prescription are maintained in EnterpriseRx
  - as you order, receive and dispense, the inventory is adjusted in the system
- Suppliers include
  - Publix Pharmacy Warehouse
  - Wholesalers
    - The Wholesaler Procedure/Documentation Guide is located on the Pharmacy page of Publix Connection. It contains information and instructions needed when dealing with our wholesaler. This guide also contains the wholesaler's customer service number to contact them for any issues.
  - secondary suppliers as needed
- Products are stored according to standard inventory sections (Pharmacy R&P Ch. 12)
  - alphabetical order unless in one of these special sections:
    - Fast movers
    - Refrigerator/freezer
    - Narcotics cabinet
    - OTC plan-o-gram
    - Special orders
    - Unsaleables

OTC Products
- OTCs include product
  - behind the pharmacy counter
  - locked in glass cases on the pharmacy sales floor
  - marketed in the display rack
  - on the HBC aisle
- OTCs behind the counter or in locked glass cases
  - OTC Core Item List (Pharmacy Operations section of Pharmacy page)
  - ordered and maintained by the pharmacy
- OTC marketed in display rack
  - Pharmacy Operations notifies you monthly through the Monthly Marketing Plan via the Weekly Memo
  - some marketed product ordered and maintained by pharmacy and some by HBC Clerk

<u>OTC Products (cont.)</u>

- OTCs in grocery aisles
  - ordered and maintained by the grocery department's HBC Clerk
  - contact the HBC Clerk upon recognizing that we are short or out-of-stock

  Important! If the HBC Clerk is unable to order or maintain products necessary for your patient, then order the item from our wholesaler and maintain it in your pharmacy until the grocery item is available.

More about the OTC Core Item List

<u>Ordering OTC Core items</u>

- All OTC items on the OTC Core Item List are set up in EnterpriseRx.
- The balance on-hands for OTC Core Items are maintained by Pharmacy Operations to assist with OTC automatic replenishment.
- Any time you sell an OTC Core item, the balance on-hand is automatically updated the next morning by Pharmacy Operations (Note: Friday, Saturday, and Sunday sales are updated on Monday morning).

<u>Ensuring successful management of this product</u>

- Ensure current balance on-hand is correct by
  - ordering all OTC Core items through EnterpriseRx
    - phone orders and orders placed online with the wholesaler will cause balance on-hand to become inaccurate
    - if necessary to order by phone or online, must manually update inventory balance on-hand
  - always scanning the UPC for these items (do not scan the pink, green or blue sticker).
    - as long as the UPC is scanned at the POS, the sales will be adjusted out of inventory in EntepriseRx that night
    - Friday, Saturday, and Sunday sales are updated on Monday morning
  - maintain Min/Max values that are high enough to ensure enough product is kept in stock between orders

<u>Stocking OTC Core items</u>

- stock according to a "plan-o-gram"
- if your plan-o-gram is not available, contact your Pharmacy Supervisor.

About PSE (these are on the Core Item List)

Storage

- All PSE is maintained behind the counter or in locked glass cases (Georgia law requires that it be behind the counter only – cannot be in locked glass cases).

Sales

- All sales are completed at the pharmacy registers (not at the front of the store).
- All sales must go through NPLEx system.
- Each associate is required a NPLEx login – see the Pharmacy Supervisor.
- The NPLEx web link is on the EnterpriseRx Home Page for easy, daily access.
- If NPLEx is down, you can not sell PSE.
- All transactions must be recorded in the manual logbook with each patient's signature and maintained for 2-yrs. from the date of last entry.
- NPLEx training guide, quick reference and other related materials in the Pharmacy Operations section of the Pharmacy page.

Other items on the Core Item List

- There are a variety of other core OTC items that change periodically.
- It is important to make sure your OTC section matches the current plan-o-gram.
- It is also important that all OTC items have a current shelftag. When prices are updated the pricing coordinator should bring new shelftags to the pharmacy.

Drug Registrations or REMS programs

- The FDA introduced the Risk Evaluation and Mitigation Strategies (REMS) to address drug safety, including issues that may have life-threatening consequences.
- Actions mandated by REMS can consist of

  supplemental communication plans or training to alert physicians, pharmacists, and patients of potential risks and to direct safe product use;

  patient registries, restricted distribution, and/or pre-therapy testing requirements; and

  ongoing patient monitoring once therapy is initiated.
- iPLEDGE is an example, however there are many more specialty drugs requiring registration or procedures to follow for ordering and/or dispensing.
- See the Drugs A-Z section on the Pharmacy page for more information.

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name Clinical-Related References

Course Description a review of our drug reference resources and our clinical programs with related references

Overview
This section includes key clinical-related information, programs and references used to exceed quality patient expectations.

Drug References

- Clinical Pharmacology© = main drug reference accessible from EnterpriseRx Home Page
- The References section on the Pharmacy page includes various other links. These links are updated as we identify additional sources.

Link	How to use
Medications During Pregnancy	Additional patient education regarding certain drugs taken while pregnant.
Merck Manuals	Drug and related reference materials
Poison Control Centers	How to contact your state's poison control center.
CDC	Reference about the spread of infectious diseases and their prevention
FDA Orange Book	Used by some states to evaluate the equivalency of a generic product to the associated brand product. If the Orange Book rating starts with an "A," it's equivalent.
FDA	Food and Drug Administration home page. This site can provide you with up-to-date information on new drugs, recalls, shortages, etc.
Location Look Up – Safe Needle Disposal	Use this site to provide patients with safe location to dispose of used needles.

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Clinical Programs

We offer a variety of clinical programs to our patients including immunizations, MTM, diabetes management, health screenings and free products. We always look for additional opportunities.

Once you complete this training program, additional clinical training courses will be assigned. For now, here's a quick overview of some of our clinical programs.

Clinical program information is maintained under the *Clinical Services* link on the Pharmacy page of Publix Connection. Be familiar with all the information in this section of the Pharmacy page.

Understand these Clinical Programs First

Here's a summary of some of the programs that will impact you on a day-to-day basis.

Sync Your Refills

- This program will sync up multiple maintenance medications for a patient to reduce the number of times they need to come to the pharmacy for pick-up. This is important for medication compliance and also workflow efficiency.
- The program is managed through PMAP system where a list of eligible patients is provided each day.
- Information about this program is on the Pharmacy page under the Clinical Services link.

ERP (Enhanced Refill Process)

- Auto-refill helps with medication compliance and is for patients with 1 maintenance prescription (or 2 prescriptions on different day supply cycles). This also helps with workload efficiency for the pharmacy.
- System will prompt you at Reception and RTP to sign a customer up for auto-refill
- Rxs will drop into workflow several days before PDT and patients receive a call or text when ready

Pediatric Antibiotic Follow Up Call Program

- Pediatric call backs are an important part of customer service and compliance
- A daily report is posted on My Reports with patients we will call that day.
- Follow the procedure and call script posted on the Pharmacy page of Publix Connection,

Free Antibiotic program

- Certain antibiotics are free for a 14-day supply

Free Lisinopril program

- All generic strengths (not combination products); 90-day supply – maximum 180 tablets for all strengths.

Free Amlodipine program

- All generic strengths (not combination products); 90-day supply – maximum 180 tablets of 2.5mg and 5mg, or maximum 90 tablets of 10mg.

$7.50 Next Best Thing to Free program

- We offer some of the most commonly prescribed generic medications for the most prevalent disease states for $7.50 for a 90 day supply.
- See the medication list and program information on the Pharmacy page

Diabetes Management System

- free generic Metformin (immediate release only); up to a 90-day supply – maximum of 360 tablets of 500mg, 270 tablets of 850mg or 225 tablets of 1000mg.
- patient compliance through ERP (auto-refill) and Sync Your Refills when applicable
- patient register for free Diabetes Health Newsletter via www.publix.com/diabetes
- ongoing ways to save on meters and strips (see the *Drugs A-Z* link on the Pharmacy page)

Immunizations

- Publix pharmacists administer influenza, pneumococcal and other vaccinations to patients where permitted by law.
- We participate in flu clinics and accept walk-ups throughout the flu season (and throughout the year in states not limited to influenza vaccination).
- Immunization certification is provided as a benefit to Publix pharmacists along with CPR certification and required OSHA training.
- Information about processing and billing immunizations is on the Pharmacy page under the *Clinical Services* link.

MTM

- Publix pharmacists provide comprehensive medication reviews (i.e. brown bag reviews), perform drug utilization reviews and work with patients and their physicians to optimize drug outcomes.
- MTM services are reimbursable, and payments are applied to the respective pharmacy.
- MTM information on specific programs, as well as Publix's reference and procedures for processing and handling these claims is on the Pharmacy page under the *Clinical Services* link.
- Some MTM sessions are conducted by staff at our Central Pharmacy. You may see placeholder Rx's for these MTM sessions in your EnterpriseRx workflow. These Rx's will have instructions on any action you need to take.

Course Name Managed Care-Related References

Course Description a review of third-party billing tools and references

Overview
Billing information is maintained on the Pharmacy page in the Pharmacy Operations section. Knowing this information will help to ensure efficient, effective and proper billing of pharmacy claims

Third-Party Billing Tools/Programs

Third Party Eligibility Check
Tool that helps you find cardholder information and is accessible from the Patient Profile Third Party tab in EnterpriseRx.

Publix Associate Discount Program
- Special brand and generic pricing
- Certain generics priced at $9 for up to a 90-day supply (see Drug List)
- Bill using
  - proper carrier code and plan (PBX PRP)
  - ID = associate's 8-digit personnel #
  - Group = 4-digit store number or if for corporate employee, then 9999
  - Billing sequence = 2 or greater
- All program details located on Pharmacy page in the Pharmacy Operations section

NPI Lookup
- helpful for updating, correcting, or validating prescriber information
  - upon set up of a new prescriber or
  - upon learning that there's a billing issue involving a prescriber
- located on the Home Page of EnterpriseRx

OTC Benefit Programs
- Help the customer save money on OTC qualifying drugs through their insurance
- Become familiar with the information on the Pharmacy page in the Pharmacy Operations section

Other
Other important information Billing information in the Pharmacy Operations section includes:
- Insurance billing information
- Insurance websites
- Medicare and Medicaid information
- Third- party audit information and tips to avoid negative audit results

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name Regulatory-Related References

Course Description a review of regulatory references and resources

Overview
Key reference materials used to ensure compliance with regulations are located on the Pharmacy page.

Note: A licensed pharmacist is responsible for maintaining knowledge of the law. As a company, we will also provide information and direction to maintain compliance with laws and regulations.

Regulatory references
Links maintained on the Pharmacy page:

Board/Agency	Location	How used/referenced

State Board of Pharmacy (BoP) Websites	Pharmacy page: *References > Government/Agency*	• Each BoP website is available for reference and each pharmacist should be familiar with its content. Use for
		  • referencing particular laws and rules
		  • keeping up with changes to laws and rules, and
		  • understanding new laws and rules.
		• All pharmacists must be able to show inspectors that they not only have access to the BoP website, but that they understand how to find the pharmacy laws and rules.

DEA Diversion Control Program		• This website contains information about the handling/processing of controlled substances.
		• It also provides a direct link to DEA Form 106 which should only be used upon direction of the Pharmacy Supervisor.
		  • Form 106 is for reporting theft or loss of controlled substances to the DEA.
		  • See Chapter 8 of the Pharmacy R&P, Losses and Theft of Controlled Substances.

Georgia Drugs and Narcotics		• This is the GA agency that is responsible for enforcement of the laws and rules pertaining to drugs and narcotics. • GA pharmacists must be able to access this site from the pharmacy and show inspectors that they are knowledgeable of this site.

Regulatory references (cont'd)

Board/Agency	Location	How used/referenced
Pharmacy R&P Guide	Pharmacy page: *References > Pharmacy R&P Guide*	• Contains important policies and procedures to ensure compliance to various regulations. • The content in the R&P works in conjunction with our new hire orientation and training program. • All associates should be familiar with the information in the R&P. • These chapters contain various regulatory references: ○ Ch. 7, HIPAA ○ Ch. 8, Regulations and Associated Publix Policies ○ Ch. 11, Ordering and Receiving ○ Ch. 14, Safety and Security ○ Ch. 15, Sanitation

Note: Links for each state's prescription drug monitoring system (PDMP) for controlled substances are located on the Home page of EnterpriseRx.

Pharmacy Accordion File

The accordion file exists in the pharmacy to hold important required documentation to be easily accessible when inspectors come in. Your training pharmacist will review the contents and requirements with you.

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Module P10:
Publix Pharmacy

Module Description:
Customer service, competitive advantage, organization, administrative processes, policies/procedures

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Course Name	Course Description	Type	Facilitator
Welcome to Publix Pharmacy	Publix Pharmacy's premier customer service efforts and what that means to you as a Publix Pharmacist	Video	Learning
Your Role as a Publix Pharmacist	customer service, the Publix Pharmacy difference, awards, accolades	ILT	Supervisor
About Publix Pharmacy	organizational structure, administrative processes, important policies & procedures, who to contact	ILT	

Legend
ILT – Instructor-led training

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name:	Welcome to Publix Pharmacy
Course Description:	Publix Pharmacy's premier customer service efforts and what that means to you as a Publix Pharmacist
Course Type:	Video
How to Access:	Log into Learning through Passport on your store's training workstation. Locate the Welcome to Publix Pharmacy Video on your To Do list and click the Start button.

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name Your Role as a Publix Pharmacist

Course Description leading edge: customer service, basic expectations, awards and accolades

Your Supervisor will cover various important pieces of information with you, so that by the end of this session you should understand how Publix is different from other retailers and how that makes it a great place to work and shop!

Publix Mission Statement
Our Mission at Publix is to be the **premier quality food retailer in the world**.

To that end we commit to be:

- Passionately focused on ***Customer Value***,
- **Intolerant of Waste**,
- Dedicated to the ***Dignity***, ***Value*** and ***Employment Security*** of our **Associates**,
- **Devoted** to the highest standards of **stewardship** for our **Stockholders**, and
- **Involved** as Responsible ***Citizens*** in our **Communities**.

Take-aways!

- **We are our customer's Concierge for Healthcare!** Customers come to us for MUCH more than filling prescription!
- Be Caring and Attentive to your patients!
- Treat your patients with respect and empathy
- Keep your pharmacy clean, neat and orderly!
- Work with a little pep in your step and with purpose!
- Maintain confidentiality!
- Follow Publix policies and procedures!
- Be committed to your role as a Pharmacist!

In closing!
In the words of our founder, George W. Jenkins, "Publix will be a better place or not quite as good because of you."

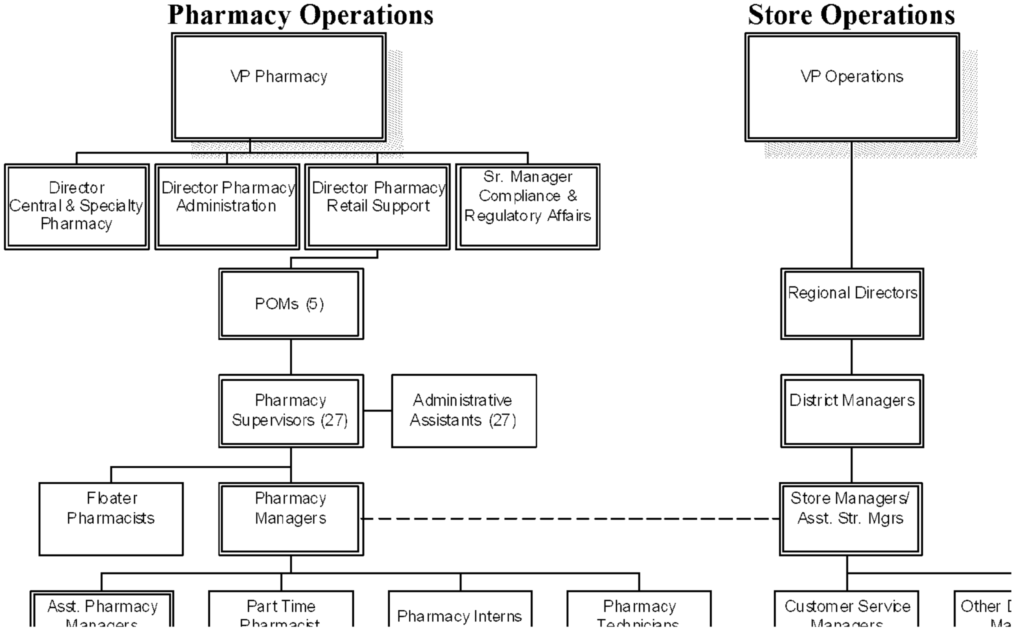
We thank you for joining the Publix Pharmacy Team and hope you understand the importance of your role in making Publix Pharmacy a success.

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name About Publix Pharmacy

Course Description organizational structure, corporate functions, important programs

Organizational structure



You report up through the Pharmacy Operations organization, but you do have some responsibility to the Store Manager. Always call your Pharmacy Supervisor for information, direction, and feedback.

General administrative processes & Important policies
Your Supervisor will cover various information with you. These resources are available to you for reviewing the information covered:

- New Pharmacist/Graduate Intern Binder
- Pharmacy Reference & Procedures (R&P) Guide
- Your Pharmacy Supervisor is always available for questions!

Who to Contact

- Your Pharmacy Supervisor
- Your Partner
- See Monitor Cards at the Data Entry and Verification workstations
- See Contacts link at the top left of the Pharmacy page

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Module P11:
Exception Queue Management

Module Description:
Overview of Contact Manager, Inbound Communication & Adjudication Exception

Course Name	Course Description	Type	Facilitator
Contact Manager & Inbound Communication	understanding how Contact Manager and Inbound Communication queues relate; processing refill renewal requests; processing prescriber refill responses and new Rxs via PPI; using contact manager for new Rx requests, Rx clarifications and failed PAs	ILT	Training Location RPh
Adjudication Exceptions and other exception queues	adjudication exception screen, handling rejections, rebilling, General Exceptions, BAR Exception queue	ILT	

Legend
ILT – Instructor-led training

Course Name	Contact Manager and Inbound Communication
Course Description	understanding how Contact Manager and Inbound Communication queues relate; processing refill renewal requests; processing prescriber refill responses and new Rxs via PPI; using contact manager for new Rx requests, Rx clarifications and failed PAs

Overview

- The Contact Manager (CM) queue is used for processing refill renewal requests sent to prescribers on behalf of the patient, as well as managing other forms of contacts including new Rx requests, Rx Clarifications and Central Processing PAs that have been unsuccessful and require retail level assistance.
- The Inbound Communication queue is where prescriber e-prescriptions and faxes are received. These may be in the form of refill request approvals or new prescriptions.
- It is a primary responsibility of each pharmacy to maintain the CM queue including entering accurate Promise Dates and Times (PDT) which is used to appropriately manage these events according to the customers expectations.
- Central Pharmacy does assist with CM and IC where permitted by law – this concept is covered in Module 12.
- An associate must be assigned to work the IC queue multiple times throughout the day.
- An associate must be assigned to work the CM queue a minimum of 3 times per day – in the morning, afternoon and evening.

How do these queues work?

Refill Renewal Requests:

Initiating a refill request from the pharmacy

- Refer to the Contact Manager Basics document, under the *Quick References* link on the Pharmacy page, for some background information and overview of how CM works.
- Review the popup that is received when trying to refill an Rx with no refills.
- When a request is initiated, a transaction will automatically be sent to the Contact Manager queue with an *Initiate Request* status and the system will automatically fax or e-prescribe that request to the prescriber. (Few prescribers only accept phoned in requests and if so, that can be set up in the system.)
- The refill request goes to the Contact Manager (CM) queue awaiting a reply from the prescriber. (The CM queue organizes all of your refill renewal requests in one location within the system.)

Handling PPI or Fax failures when sending refill renewal requests:

- Refer to the Contact Manager Basics document, under the *Quick References* link on the Pharmacy page, for detailed examples of how to identify and handle PPI or fax failure by viewing the event log on the CM screen.
- There are various reasons that a PPI or fax may fail. The important thing is to evaluate CM events with an *Initiate Request* status and evaluate the information in the event log on the CM screen.

Prescriber refill approvals

- When a prescriber uses e-prescribing (PPI) or faxing to respond to a refill renewal request the response is received by the pharmacy system and matched to the related CM event in the queue as long as certain information matches perfectly (e.g., patient name, date of birth, drug).
- If the system cannot make a match, the response to the refill renewal request stops in the Inbound Communication queue for someone to review and match to an existing request in the CM queue or to a patient.

Advancing a 3-day supply on a refill renewal request:

- Review the Advancing an Emergency Supply on a Refill Renewal Request document on the Pharmacy page under the *Quick References* link.
- Review how to advance a 3-day supply to ensure patient is taken care of and inventory is handled properly.
- **Be sure to enter a Transaction Note** from the Contact Manager Details screen stating that "the patient was given a 3-day supply - deduct this quantity from the fill".

New Rx requests:
Review the Contact Manager Part 2 document located on the Pharmacy page under the *Quick References* link.

Initiating a New Rx Request

- When a patient comes in with a transfer with no refills or if they say they've been taking their medications differently per the doctor's instruction, then a New Rx Request can be set up in the system and managed in Contact Manager.
- The CM event maintains the status of the request whether it's called or faxed into the prescriber. The key is that the details are maintained in the system for any user to reference and work on until the new prescription is either approved or denied.

Receiving a prescriber's new Rx request:

- When a prescriber transmits a new prescription via e-prescribing (PPI), it will go right into workflow if it matches on several pieces of information (e.g., name, birth date). If the system cannot make a match, the response to the New Rx request stops in the Inbound Communication queue for someone to review and match to an existing request in the CM queue or to a patient.
- Whether the response is electronic, fax or oral, the CM event must be updated and it can be further processed using the Approve With Changes button.

Rx Clarification requests:
Review the Contact Manager Part 2 document located on the Pharmacy page under the *Quick References* link.

Initiating a Rx Clarification Request

- When a prescription is difficult to read or interpret, then a Rx Clarification Request can be set up in the system and managed in Contact Manager.
- The CM event maintains the status of the request whether it's called or faxed into the prescriber. The key is that the details are maintained in the system for any user to reference and work on until the new prescription is either approved or denied.

Central Prior Authorization Request Failures:
Review the Contact Manager Part 3 document located on the Pharmacy page under the *Quick References* link.

- Occasionally, Central Pharmacy is unable to get a prior authorization approved by a third-party payer. Central Pharmacy contacts the prescriber 3 times, requesting their help in getting the PA approval. After doing so, we consider the attempt "failed". Also, if a prescriber or insurer "denies it quickly" we will treat it the same way
- Once the PA process has failed, Central Pharmacy will move the transaction from the Adjudication Exception queue to the Contact Manager (CM) queue with a Contact Reason of *Adjudication Exception*. This enables the local pharmacy to handle the prescription from that point working with the patient, insurance, and prescriber as necessary.

Keys to taking advantage of automation!
The system will automatically fax or e-prescribe (PPI) a refill request to the prescriber, if the prescriber profile is set up correctly with

- the *Contact* field is set to "Fax" (never set this field to "PPI")
- an accurate fax #, and
- with correct PPI information (if the prescriber uses electronic prescribing).

When this is complete, the system will automatically fax or PPI prescriptions accordingly. Also, if PPI is down, a fax will automatically send to the prescriber instead.

The Contact field in the Prescriber Profile

***Contact* field**	**Action**
Do Not Contact	a refill request will not transmit to the prescriber. This is only used when prescribers prefer the patient to request refills.
Fax	a refill request will be • transmitted to the prescriber via fax, or • e-prescribed (PPI) to the prescriber if the prescriber subscribes to the e-prescribing service and we have them set up properly in our system. Note: See Module 7, Prescriber Profile for information on PPI set up.
PPI	a refill request will only transmit via PPI. Note: You should never use this setting because it will limit your options when the e-prescribing service is down.
Phone	An associate will need to initiate the refill request by calling the prescriber or manually faxing the prescriber. However, if the prescriber accepts fax requests, then: • update the prescriber profile with the fax number • re-set the *Contact* field in the Prescriber Profile to Fax, and • re-initiate the refill renewal request (so that the system will fax the request this time and going forward).

Pharmacist I/New Hire Graduate Intern Training
Required Courses

A closer look at Contact Manager

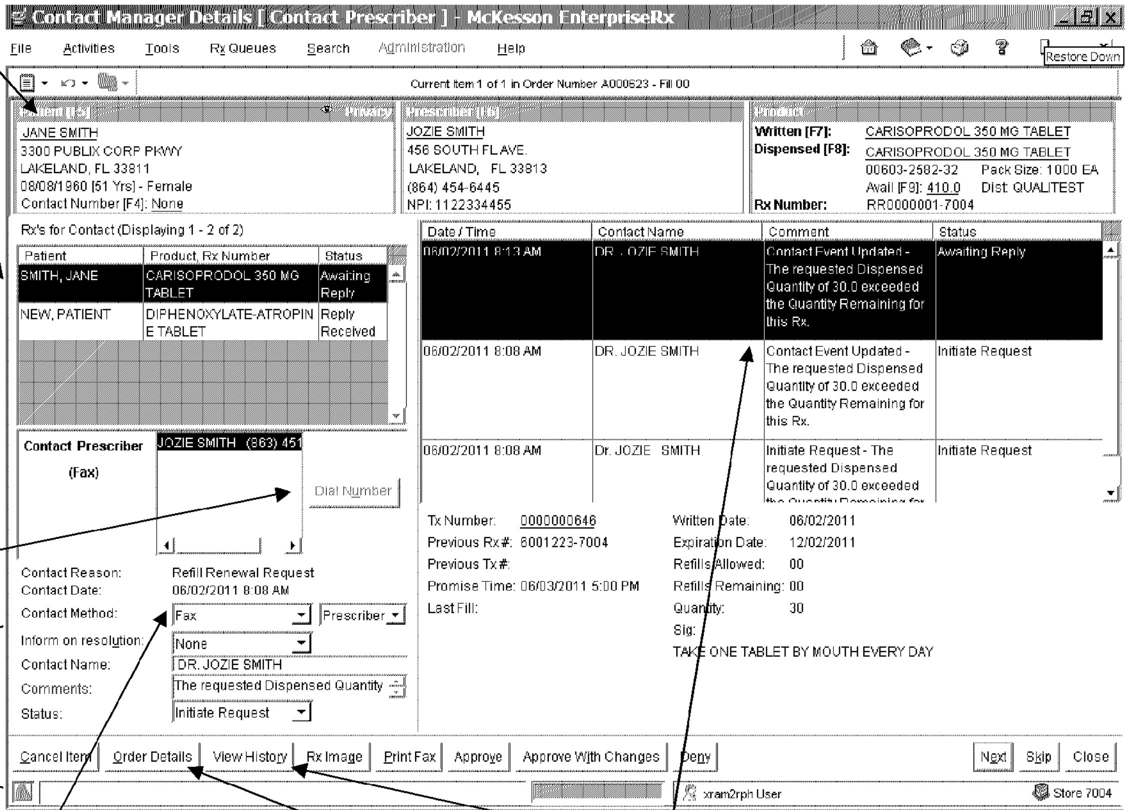
Understanding the Contact Manager screen

Profiles can be accessed via hyperlinks.

All prescriptions in CM for a patient are listed here with status and the prescriber name and # below.

You cannot dial a phone number through the system at this time.

Various contact information and fields to manually add information about work you have done on this transaction. Manually updated when it's a "phone" contact



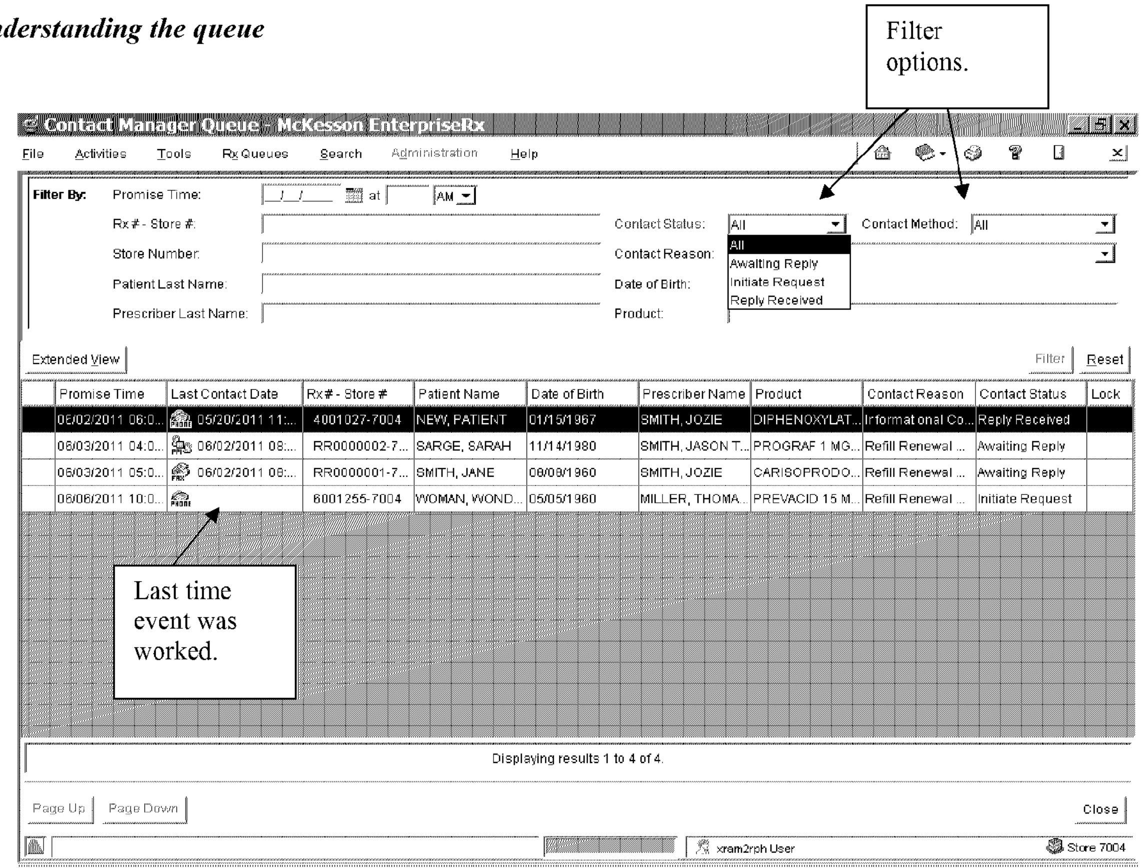
For PPI & Fax to work seamlessly, the Contact Method must be set to Fax. (Do not set to PPI! And only set to Phone if the Dr. only accepts phone requests.)

The status of the Rx request is automatically updated here unless it's a Phone event. (Phone events should be rare.)

History of contact events are in this Event log and a more detailed history can be accessed using the View History button at the bottom of the screen.

- Hyperlink to the prescriber profile to add a fax number, change the contact method to fax – this will update the contact method in the CM event and for future fills.
- Use the CM history to understand the status.
- Avoid accidentally setting up a duplicate Rx for a patient by reviewing the patient's profile before approving the event.
- The Approve with Changes button – used when the prescriber faxes approval of the refill and provides opportunity to scan new image

Understanding the queue



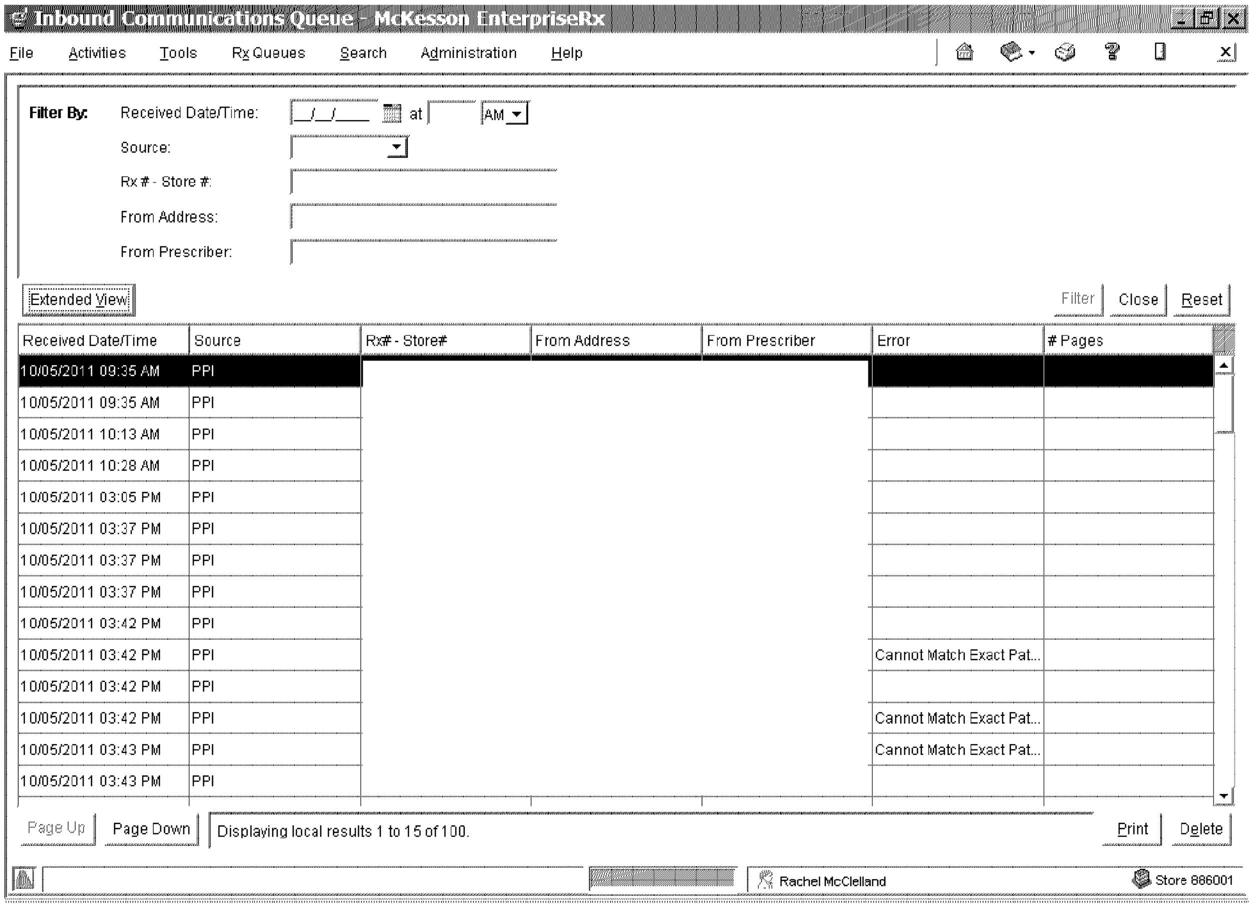
Tips

- From the queue, understand the last time a CM event was worked and how that relates to the PDT. Use this information to act on a CM event.
- Filtering is extremely helpful when managing the different types of events in the queue.

Pharmacist I/New Hire Graduate Intern Training
Required Courses

A Closer look at Inbound Communication

Prescriber refill renewal responses and new prescriptions can be sitting in this queue waiting to be processed.



Tips

- There's a workaround for PPIs that come through without an image. Review the Work-around for Rx in ICQ with No PPI Image document located on the Pharmacy page under the *Quick References* link.

Working the Inbound Communication (IC) queue

- First, evaluate each transaction in the queue very carefully
  - Is it a new or renewal prescription?
  - Is it a rejection as indicated by the messages in the Error column of the IC screen?
  - If it's new, does it have all pertinent information on the hard copy?
  - If it's a renewal, is it an approval, an approval with changes, or a denial/rejection?
- Second, match the Rx to a CM event (following the system prompts) or patient (using patient search protocol).

If a transaction in Inbound Communication is a…	**…then perform the following steps from the IC queue**
rejected Transaction	• verify the rejection message in the Error column on the screen and notice that the hard copy image has a "refill renewal request" heading • delete/cancel this transaction, then go to the CM queue and re-transmit the refill request
new Rx	• review the hard copy image to verify that this is a New Rx • verify that the information on the hard copy is legible and complete • review the Error column for messages as to why the Rx can not be matched to a patient in the pharmacy system • use the patient search protocol to match the prescription to a patient profile • verify that there is not a similar prescription in the CM queue for this patient (sometimes prescribers send approved refill requests as new prescriptions)
refill renewal response – approval	• review the top of the hard copy image to verify that this is an approved refill renewal • review the Error column for messages as to why the Rx can not be matched to a CM event in the pharmacy system • associate the transaction with a CM event and follow it to the CM queue where the Tx can be "approved" • if a CM event does not exist, then use the patient search protocol to match the prescription to a patient profile
refill renewal response – approve with changes	• review the top of the hard copy image to verify that this is an approved refill renewal with changes • review the Error column for messages as to why the Rx can not be matched to a CM event in the pharmacy system • associate the transaction with a CM event and follow it to the CM queue where the Tx can be "approved with changes" • if a CM event does not exist, then use the patient search protocol to match the prescription to a patient profile
refill renewal response – denial or rejection	• review the top of the hard copy image to verify that this is a denied refill renewal • associate the transaction with a CM event and follow it to the CM queue where the Tx can be "denied"

Managing these Queues

- One of the keys to success is ensuring the queues are reviewed and worked daily – multiple times.
- Review detailed information on working Contact Manager on the Pharmacy page under the *Quick References* link.

Pharmacist I/New Hire Graduate Intern Training
Required Courses

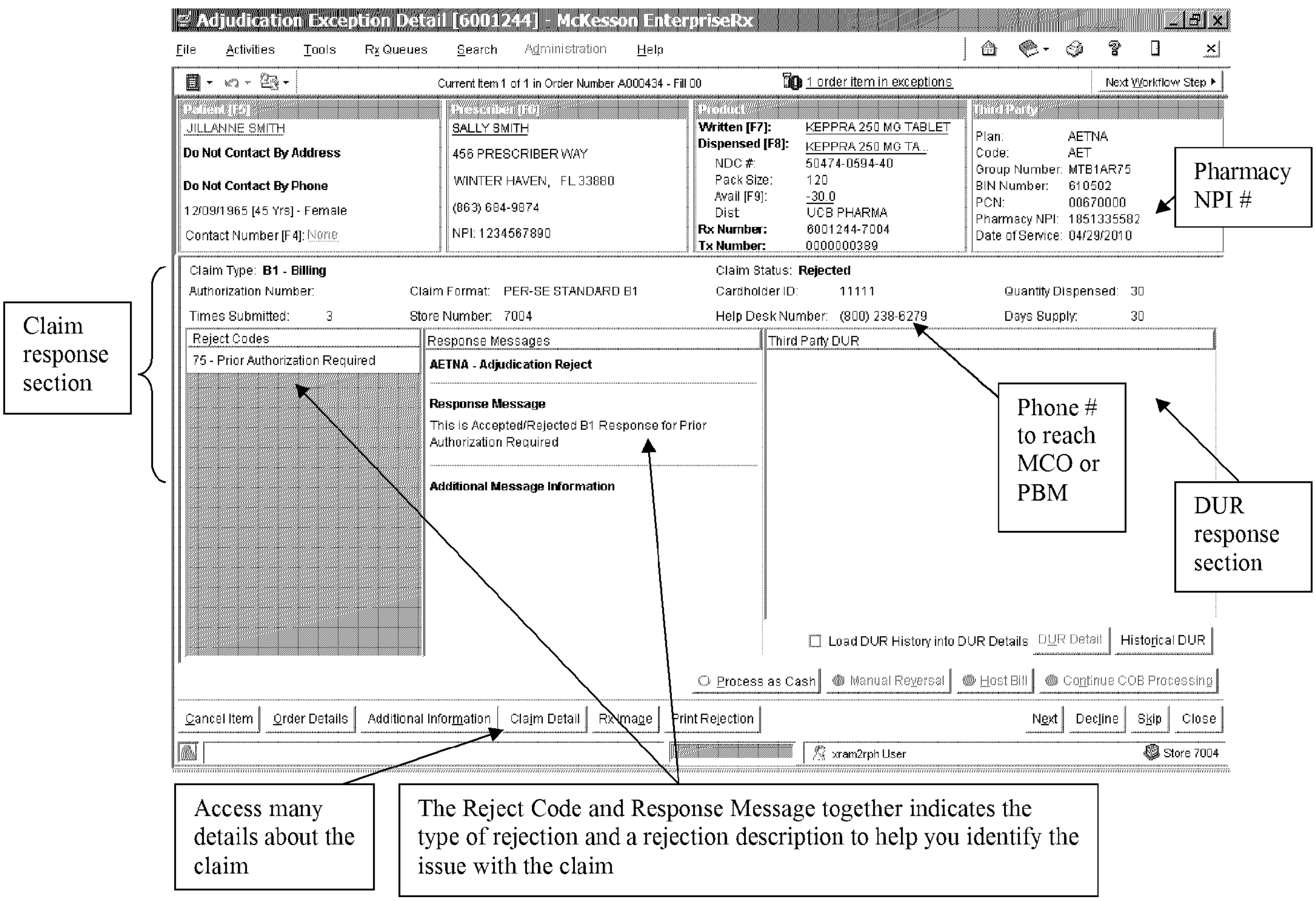
Course Name Adjudication Exceptions

Course Description adjudication exception screen, handling rejections, rebilling, General Exceptions, BAR Exception queue

Overview

- An *adjudication exception* is a claim that results in a rejection of coverage and payment.
- You must determine what's causing the rejection and how to correct the issue to continue billing and filling the prescription.

A Closer Look at the Adjudication Exception Screen



<u>Resolving Adjudication Exceptions</u>

Resolving rejections is tackled like any other problem:

1. Define and clarify the problem.
2. Identify the potential causes of the problem.
3. Identify and evaluate options for fixing the problem.
4. Identify the best option and implement a solution to the problem.

Define and clarify the problem

First, understand the two main types of rejections, how they are presented on the Adjudication Exception screen and how to understand the rejection response from the MCO or PBM.

Type of rejection	How presented on the Adjudication Exception screen	Description
Insurance rejection	The Reject Code and Response Message on the Adjudication Exception screen will look like this: ***Reject Code:*** *code # with short description* ***Response Message:*** *Adjudication_Reject* *Rejection description would show up here*	An *insurance rejection* is a result of the MCO or PBM's comparison of the claim information to the patient's insurance benefit. Any issues with coverage or drug utilization will result in a rejection.
Publix edit	The Reject Code and Response Message on the Adjudication Exception screen will look like this: ***Reject Code:*** may or may not have a code # & description ***Response Message:*** *Adjudication_Reject* **Pub* ##### with rejection description here*	A *Pub Edit* is a Publix edit that is set up by a separate processor, called a clearing house, that evaluates the claim prior to sending it on to the MCO or PBM. It identifies problems with the claim billing that aren't related to the patient's coverage, but will cause problems with receiving a paid claim from the MCO or PBM. A Pub edit that requires the pharmacy to fix something on the claim will present itself at the time the clearing house evaluation is completed. Once this type of Pub edit is resolved, the claim will continue on to the MCO or PBM for an evaluation against the patient's insurance benefits. A Pub edit that is informational (identified as a "warning") will result in the claim continuing on to the MCO or PBM. Then the Pub edit and any MCO or PBM rejections will be presented at the same time to the pharmacy.
Publix edit (warning only)	The Reject Code and Response Message on the Adjudication Exception screen will look like this: ***Reject Code:*** none ***Response Message:*** *Adjudication_Reject* **Pub* ##### Warning with rejection description here* If the Pub edit warning is presented in combination with an insurance rejection, it will look like this: ***Reject Code:*** *code # with short description* (for the insurance rejection only) ***Response Message:*** *Adjudication_Reject* **Pub* ##### Warning with rejection description here* *Then the insurance reject message would be here*	

Identify the potential causes of the problem
Below is a list of some general rejection categories and possible causes.

Rejection category	Rejection description	Potential causes
Refill too soon	This indicates that the refill cannot be completed at this time considering the days supply on the last fill.	• prescription is being processed before the patient should be receiving the prescription • the last fill of the prescription has incorrect days supply
Prior authorization (PA) required	This means the prescriber or the patient's insurance must provide a PA in order for the prescription to be filled.	• patient's insurance benefit requires a PA for the drug being dispensed • a brand was selected when a generic could have been selected instead
Missing or invalid days supply	This means there's something incorrect about the days supply included on the claim.	• the days supply field was not completed in data entry • a sig code was not used in data entry causing days supply to not automatically calculate properly • days supply was not properly calculated in data entry
Patient is not covered	This means the patient isn't covered by the insurance receiving the claim.	• patient may have changed insurance plans • patient's cardholder ID/group # may be wrong • the wrong insurance plan could have been added to the patient's profile
Non-match cardholder ID or person code	This means the patient's cardholder ID or person code doesn't match the insurance eligibility records.	• the information on the patient's insurance card may have been entered incorrectly • the patient's insurance card may have incorrect information on it
Plan limitations exceeded	This means that the quantity being dispensed or the days supply exceeds the amount allowed by the insurance.	• the quantity entered in data entry may be incorrect • the days supply entered/calculated in data entry may be incorrect • may be attempting to fill a larger quantity of the medication than the third-party will allow
Product service not covered	This means the dispensed drug is not covered by the insurance.	• a non-formulary drug was selected • a brand was selected instead of a generic • the particular drug is not covered
DUR rejection	This means a clinical conflict was identified by the third-party.	• patient may have prescriptions filled at non-Publix pharmacies that are causing the conflict • patient may have other personal information filed with their insurance company indicating a conflict with the drug being dispensed
Missing or invalid pharmacy # or provider qualifier	This means there's an issue with the setup of our pharmacy in the insurance plan's provider network.	• the insurance may not have enrolled our pharmacy in the program properly • Publix may not be in that insurance plan's network of pharmacy providers
Non-match prescriber ID	The prescriber information on the claim is incorrect.	• The prescriber's name doesn't match the NPI, DEA or license # information. • The prescriber license has been deactivated.

Identify and evaluate options for fixing the problem

Quite a few components of a prescription may need to be evaluated to narrow down the cause of the issue. This includes validating some of the following pieces of information:

- TP information on a patient profile
- the last fill of a prescription on the Rx tab of a patient profile
- key data entry details against the hard copy on the Rx tab of a patient profile
- details about the transaction like date of service, days supply, patient pay amounts, and insurance claim details on the Tx tab of a patient profile
- prescriber ID information on a prescriber profile
- supervising prescriber information for PAs and ARNPs

Identify the best option and implement a solution to the problem

Once you've determined the cause, there are typically a few ways to fix it; however, we find that following this rule of thumb ensures the claim is processed correctly.

If you need to correct…	…then
something in a patient or prescriber profile	• decline the prescription back to data entry • correct the information in the profile, then • resubmit the claim
information located the Additional Information screen	• click the Additional Information button • correct/add to the appropriate field • click off the field and SAVE the changes, then • resubmit the claim

Rebilling a Prescription
Follow this rule of thumb for rebilling a claim.

If the prescription…	…and	…then
is not released from the pharmacy system	you need to correct something in the patient profile to rebill it	From the Release to Patient screen: • use the Patient Profile button to access the patient's profile to add or correct TP information, then • use the Edit TP button to select the correct TP and reprocess the claim. Note: This avoids a lot of re-work through the queues.
	you need to correct something in the Rx details in data entry	From the Release to Patient screen: • decline the prescription to edit data entry, then • correct the issue and push the prescription back through workflow.
is already released (sold in the pharmacy system)	you need to: • bill to a different insurance or cash, or • correct the days supply	• from the Search menu, find the patient's profile and update TP information as necessary, then • from the Tools menu, use the Bill After Release function to rebill the prescription. Note: This function can't be used for Partial Fills, but is a great feature for other situations. You avoid having to bring the transaction back into workflow and it also keeps the patient's release to patient signatures intact.
	you need to correct something in the Rx details in data entry	This option involves some discussion with your pharmacist. Depending on the date of service, you may not be able to bring it back into workflow without a call to the Publix Support Desk. However, if you are dealing with the most current fill of the prescription, your pharmacist may have access to change the status of the prescription to bring it back into workflow and correct the problem.

More about Bill After Release and Edit Third-Party

Bill After Release

- Review the Bill After Release (BAR) document on the Pharmacy page under the *Quick References* link.
- Bill after Release can only be use once the prescription has been released to the patient. Sometimes things come up after that point and this is a simpler way to address some issues without having the bring the prescription back into workflow.
    - prescriptions billed and sold as cash that need to be billed to a TP
    - prescriptions sold and billed to an incorrect TP that need to be billed to another TP
    - prescriptions billed or needing to be billed as a coordination of benefits (COB) and
    - when changing the days supply within a re-submission window.
- BAR can not be used for Partial Fills because partial fills are not billed to insurance. The billing for these transactions is upon the Completion Fill.
- When using BAR the patient's original signature from Release to Patient is kept with the transaction.
- When using BAR new labels and paperwork automatically prints.
- An adjudication exception using BAR results in the claim going into the BAR Exception queue. This queue needs to be reviewed on a regular basis.

Edit Third Party at Release

- If an Rx has a status of Ready and needs to be re-billed, use the Edit Third Party button on the Release to Patient screen. This will complete reversal and resubmission in one easy task.

General Exceptions

Review the General Exception queue explaining that occasionally if the system can't process a claim due to a system network disruption or some other technical issue, then the system will push the claim to General Exception. This issue may need to be called into the Pharmacy Support Desk.

Module P12:
Other Tools and Functions

Module Description:
a review of various system tools and functions outside of workflow

Course Name	Course Description	Type	Facilitator
Pharmacy System Tools	a review of various tools used when filling, billing and releasing prescriptions; how to perform price quotes; how to return items to stock and more	ILT	Training Location RPh
Other Pharmacy System Functions	a review of centralized functions and other services made possible with a centralized pharmacy system	ILT	

Legend
ILT – Instructor-led training

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name	Pharmacy System Tools
Course Description	a review of various tools used when filling, billing and releasing prescriptions; how to return items to stock and more

Overview
Various tools have been covered in other sections of this training program. These are additional tools that are important to understand.

Rx Status Change
- Typically used when a patient has determined they do not want a prescription that has already been sold to the patient.
- The prescription status is changed from Sold to Ready then cancelled (i.e., credit returning the claim and returning the medication to inventory.)
- Review the document on the Pharmacy page titled Handling Returned Prescriptions using Rx Status Change, under the *Quick References* link.

Copy Rx
- Used to re-assign a prescription when there are data entry issues identified after the initial fill.
- Examples include:
  - written product selected is discontinued or
  - data entry error is found on a refill Rx.
- The original prescription will be inactivated once this function is performed.
- Review the document on the Pharmacy page titled Copy Rx Function, under the *Quick References* link.

Return to Stock
- Each day (see Pharmacy Task Checklist) prescriptions in will-call for 10 days or more are returned to stock.
- A Return to Stock report is run and once the prescriptions are pulled from will-call, the claims can be returned to stock in the system with a click of a button.
- Review the Return to Stock document on the Pharmacy page, under the *Quick References* link.

Move Rx
- Used to move an Rx from one profile to another if you determine that it was accidentally filled on the wrong patient profile (e.g., filled an Rx for Robert Smith Sr. on Robert Smith Jr.'s profile).
- Read the Move Rx document on the Pharmacy page under the *Quick References* link.

Prescription Transfers
- Information on transferring prescriptions in and transferring prescriptions out is stored on the Rx Details of the prescription in the Rx Profile. Your trainer will review this process with you.

Clinical Inquiry
- Used to review interactions between a drug and other drugs, disease states or allergies.
- To perform a clinical inquiry in the pharmacy system go to *Tools > Clinical Inquiry*

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name Other Publix Pharmacy Programs and Services

Course Description a review of key programs and services

<u>Workload Balancing (WLB) and Central Pharmacy (CP)</u>
Both of these programs use the pharmacy system to

- efficiently complete work in our pharmacies improving ready-when-promised times
- help us manage labor by allocating work among multiple locations when possible
- help us manage inventory

Program	Description
WLB (FL, SC, TN) (AL – limited basis)	• Each store is in a Pharmacy Supervisor "squad" • Each store works their own prescriptions, as well as Data Entry and PV1 for other locations in their squad.

Central Pharmacy
(FL Only)
	The goal of Central Processing is to keep the prescription moving forward by resolving exceptions.
	• Central Processing Pharmacists and Technicians assigned to groups of stores work the highest priority prescriptions in the following queues
	  • Adjudication Exceptions
	  • Contact Manager
	  • Inbound Communication
	  • PV1
	• Central Clinical Pharmacists and Technicians process Medication Therapy Management (MTM) cases.

	The goal of Central Fill is to reduce inventory in the pharmacies. • Central Fill Pharmacists and Technicians perform Product Dispensing and Final Verification (PV2) prior to shipping prescriptions to the appropriate pharmacies.

Ways to make WLB and CP a success for your pharmacy

- must follow Reception Basics requirements
  - for example, hard copy must be clearly scanned with phone number and PDT
  - see Reception Basics sticker on image scanner for a reminder
  - review details on the Reception Basics document, located on the Pharmacy page under the *Quick References* link
- must set accurate PDT in the pharmacy system
- must use standard PDT coding
  - Prior Authorization –change Delivery method to **1-PA REQ**.
  - 5:55 – Leave for home store and always add a TX Note with an explanation
- graciously perform WLB work and receive assistance through WLB and CP

IVR , Web-refills and the Publix Pharmacy app

- Patients can request refills by calling the pharmacy, using www.publix.com or downloading the Publix Pharmacy app.
- This is only preferred for non-maintenance medications.
- SYNC and ERP (see below) are preferred for maintenance medications.

Sync Your Refills

- This program is beneficial when patients have more than 1 maintenance medication. It works by syncing up multiple maintenance medications for a patient to reduce the number of times they need to come to the pharmacy for pick-up. This is important for medication compliance and also workflow efficiency.
- The program is managed through PMAP system where a list of eligible patients is provided each day.
- Once you've completed this training program, you will complete training modules in Learning for the Sync Your Refills program.

Enhanced Refill Process (ERP)

- This program is helpful when a patient has only 1 maintenance medication, by automatically pushing the prescription refill into workflow each month.
- Signing up patients for ERP is easy – see detailed information on the Pharmacy page under the *Quick References* link

Outbound Calling/Texting

- EnterpriseRx will generate an initial phone call or text message to the patient for prescriptions in the Ready status.
- EnterpriseRx will also generate a reminder phone call or text message to the patient if the prescription is not picked up.
- The Patient Messaging Access Portal (PMAP) is a website that must be accessed daily to identify patients with incorrect or non-working phone numbers so that when the patient arrives to pick up the Rx, the phone information can be corrected.

LDM

Publix is partnered with LDM Group to produce real-time printed educational information that will empower our patients to improve their health. This information is delivered when a patient picks up their prescription. These messages include:

- CarePoints® targeted treatment messages, personalized and customized to your location and patients. The message includes information about the customer's prescription and relevant information about the condition being treated. These messages increase compliance and persistence, improving the patient's overall health outcomes. Messages include *Welcome to Therapy*, *Continuation of Therapy*, *Educational*, *Adjunctive Therapy* and messages for patients who are late refilling their medications.

- MedGuide™ drug information which prints seamlessly at the time of dispensing for required drugs, simplifying the task of maintenance and distribution.

- ValueAdd™ messages which will allow Publix to promote services, products, recipes and events unique to your location.

- These print on goldenrod paper so the pharmacist will be prompted to provide the counseling when the patient comes in to pick up their prescription.

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Module P13:
Inventory Management

Module Description:
basics of inventory management, ordering, receiving, and stocking

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Course Name	Course Description	Type	Facilitator
Inventory Basics	basic inventory concepts, wholesaler programs, system tools and pharmacy processes to promote and drive management of inventory	ILT	Training Location RPh
Ordering, Receiving & Stocking	Ordering, receiving & stocking procedures	ILT	

Legend
ILT – Instructor-led training

Course Name	Inventory Basics
Course Description	basic inventory concepts, wholesaler programs, system tools and pharmacy processes to promote and drive management of inventory

Overview

- Inventory management is the responsibility of everyone in the pharmacy.
- It's important because
    - Inventory purchases are one of our largest costs of doing business and it must be managed well for Publix Pharmacy to remain profitable.
    - Mismanaged inventory can lead to profit losses in the form of shrink which is mainly made up of unsalable product – product that becomes outdated.
    - We have to have the right products at the right time to ensure that we can provide our customers with prescriptions when they need them.

Inventory Management Basics

There is information on several inventory management processes located in Ch.12 of the Pharmacy R&P Guide on the Pharmacy page of Publix Connection.

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name Ordering, Receiving & Stocking

Course Description ordering, receiving & stocking procedures

Overview

- The system automatically generates orders to be reviewed and modified, if necessary, prior to the order cut-off time.
- Receiving & stocking includes the process of verifying product received against the order; and then stocking the items on the shelves and updating inventory balances in the system by scanning the order to be received.
- It's important that the inventory balance-on hand for each drug on the shelf is maintained accurately in our pharmacy system.

Ordering

- Ordering was covered to some degree in Module 9.
- In Module 7, Drug Profiles, basic knowledge of order parameters (Min/Max order points) was covered.
- Details of ordering will be covered by your trainer; however, the high level process for ordering prescription medications, includes:
  - 1st – reviewing the system generated order about 30-minutes before the pharmacy's cut-off time
  - 2nd – adding items to the order based on the items in the Fill on Arrival queue
  - 3rd – checking that the order was received by the supplier.
- Orders are accessed from the Tools menu under Inventory.

Receiving & Stocking

- Stocking was covered to some degree in Module 9.
- Details of receiving and stocking will be covered by your trainer..
- Pharmacists ONLY can check in all controlled substances.
- Remember the First-In-First-Out stocking method – stock full bottles behind partials.

Important standard procedures

- Ordering, receiving, and stocking product is an important and very detailed process best learned working side-by-side with someone.
- Review in detail Chapter 11 of the R&P on the Pharmacy page @ *References > Pharmacy R&P Guide*.

Pharmacists: <u>Recording Pharmacist I training Course Completion</u>

Once you have completed the entire Pharmacist I training program, you must record completion in Learning. Please follow the steps below:

1. Log into Learning through Passport.
2. Locate the Pharmacist I training program on your To Do list and click **Start**.
3. Close the document that reads "Have you completed the Pharmacist I training program?"
4. Select **Yes** in Learning under the question "Have you completed this activity?"
5. The course will no longer be on your To Do list and will be listed on your Training Transcript with the completion date.

Graduate Interns: <u>Recording New Hire Graduate Intern Training Course Completion</u>

Once you have completed the entire New Hire Graduate Intern Training program, you must record completion in Learning. Please follow the steps below:

1. Log into Learning through Passport.
2. Locate the New Hire Graduate Intern Training program on your To Do list and click **Start**.
3. Close the document that reads "Have you completed the New Hire Graduate Intern Training program?"
4. Select **Yes** in Learning under the question "Have you completed this activity?"
5. The course will no longer be on your To Do list and will be listed on your Training Transcript with the completion date.

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9/30/22 Carrie Campbell, RDR
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BegControl :	PUBLIX-MDLT8-00059641
EndControl :	PUBLIX-MDLT8-00059764
FamilyID :	PUBLIX-MDLT8-00059641
Internal Reference Number :	
Custodian :	CS Training Materials
Custodian - All :	
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Pharmacy Operations

Pharmacist I / New Hire Graduate Intern Training
Student Workbook

Publix.

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If you have any questions or comments about this document or would like to be added to the distribution list for this document, please contact the document owner.

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Introduction

Welcome!

Welcome to Publix where you will find that working is a pleasure! You have accepted a very important role in our Pharmacy Department where you will be responsible (or will soon be responsible if you are a graduate intern) for the daily operation of the pharmacy and the delivery of premier customer service.

About this Student Workbook

You have received this Student Workbook to assist you through your training. It contains key take-aways and summaries for each course that you complete. This is yours to keep, so take notes and write in it as much as you want.

Program name Pharmacist I / New Hire Graduate Intern Training

Student
-newly hired pharmacists (into any pharmacist job class)
-newly promoted pharmacists (first time in a pharmacist job class)
-newly hired graduate interns

Facilitator
-staff at training location as assigned
-Pharmacy Supervisor

Completion Completion will be recorded in Learning by you at the end of the training program.

Schedule Training length is 2 weeks, 8 total days. (Four 8 hour days the first week and four 10 hour days the second week.) The day of the week is flexible according to pharmacy needs.

Content Content is laid out by day. At times you may move past the current day or not finish the current day's topics. This is fine, you can complete the content on the next scheduled day. However, please complete the content in order of the day-to-day schedule.

Day	Length	Module Name	Facilitator
1	8 hours	Publix Pharmacy Practice	Training location RPh
		HIPAA Compliance	
		Physical & System Workflow I	
		Operating the Cash Register	
2	8 hours	Physical & System Workflow II	Training location RPh
		MethGuard Training	
3	8 hours	Physical & System Workflow III	Training location Rph
		Compliance Courses	
4	8 hours	References & Resources	Training location RPh
		Publix Pharmacy	Pharmacy Supervisor
5	10 hours	Exception Queue Management	Training location RPh
6	10 hours	Other Tools & Functions	Training location RPh
7	10 hours	Inventory Management	Training location RPh
8	10 hours	Overlap day at home store w/partner (Non-floater pharmacists and graduate interns only. Floaters remain at training store.)	Home store partner

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Module P1:
Publix Pharmacy Practice

Module Description:
department overview, service expectations and tools, daily tasks, workflow overview and patient safety

Course Name	Course Description	Type	Facilitator
Department overview	pharmacy department layout, security within our pharmacy	ILT	Training Location RPh
Service Expectations and Tools	proper use of the phone and intercom, customer service techniques	ILT	
Day-to-Day tasks	opening & closing steps, daily tasks, other tasks, important sources of information	ILT	
PPCQIP	workflow overview and standard safety practices	ILT	

Legend
ILT – Instructor-led training

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name Department overview

Course Description pharmacy department layout, security within our pharmacy

Department layout

Each pharmacy is split up into three main areas:

Medication Stock Area (behind the Counter)	Dispensing Area (the Counter)	Sales Floor
• Alphabetized drug shelves • Fast movers • Refrigerator stock • CII cabinet/drawer • Storage cabinet • PSE (Pseudoephedrine) products • Diabetic supplies • Compounding or preparation area	• Pharmacy system workstations • Image scanner • Thermal printer(s) • Laser printer • Counting trays • Vial stock/supply drawers • Will-call area • Fax machine • Shredder	• Customer Drop off • Customer Pick up • Monthly plan-o-gram product displays and related signage • OTC aisle • Blood pressure machine • Required signs (state & Federal) • Advertising signs • Storage cabinet in back room

Below is a list of approved items that can be kept on the prescription filling counter. This is a list of items beyond Publix hardware, such as your computers, scanners, printers, etc.

- baskets (when not in use, store below counter)
- calculator(s)
- counting trays and spatulas (extras not being used should be in drawer)
- hardcopies by schedule in small baskets (store in drawer if possible)
- lid opener/remover
- mouse pads
- patient info forms (blank)
- pen/pencil holder w/ Sharpie & scissors
- phone/headset
- Rx bags – large, medium, small
- Rx pad(s)
- Sani-wipes (for cleaning counting trays/thermal printers)
- scale (if used for counting)
- stapler
- staging bin – Rx's to be put in will call
- stamps used in prescription filling
- store phone extension list
- TriMaxx Vial 3rd panel rolls and holder

Pharmacy Security

- lock box process is in Ch. 4 of the Pharmacy Reference and Procedures Guide (for reference once you get to your work location, or for graduate interns once you become a licensed pharmacist)
- pharmacy must be locked outside of business hours
- no purses or bags in pharmacy

Note: This protects patient's PHI, as well as Publix's inventory.

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name Service Expectations and Tools

Course Description proper use of the phone and intercom, customer service techniques

Pharmacists R.O.C.! = Pharmacists Recognize Our Customers!

- See the Pharmacists ROC! sticker as a reminder each day
- Review the Pharmacist ROC! Information in Ch. 3 of the Pharmacy R&P Guide
- These are standard practices that help us recognize customers throughout the day.

Service Expectation	Description	Examples of when to use
The 10 ft rule	Speak to and smile at everyone within 10 feet of you.	• customers passing by the pharmacy, even if they're not stopping for assistance • customers waiting next in line at the pharmacy counter • customers in the OTC section appearing to need help
The 10 sec rule	Greet customers within the first 10 seconds of their arrival in your department.	• be sure to assist a customer right away when they approach the pharmacy counter
The **CALM** approach	1. Stay **C**ool. 2. **A**pologize for the problem. 3. **L**isten with empathy. 4. **M**ake it right.	• customer upset about prescription filling wait time • problems with third party insurance billing

Using the Telephone

- Answer the phone within 3 rings.
- Greet the caller and give them your name and title (e.g. "Publix Pharmacy this is Jane, Pharmacist, how can I help you?")
- Speak with a friendly and enthusiastic voice.
- Use courteous and professional tone and word choice.

Using the Intercom

- Select an available intercom line.
- Speak clearly in a natural tone without shouting.
- Use a positive tone of voice.
- Keep the announcement brief.
- Repeat the complete announcement.
- Press the Release button before returning the handset to the cradle.

Patient Privacy

- Always be aware of those who are within earshot of you when discussing a patient's PHI on the telephone or at the pharmacy counter. Slide down the counter to have a conversation with a patient if your pharmacy design permits. Also, keep your voice low when conducting such conversations.
- Also a patient's PHI should never be discussed with other associates except when associated with the patient's treatment, billing/payment, or other healthcare-related operations.

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name Day-to-Day Tasks

Course Description opening & closing steps, daily/weekly tasks, other tasks, important sources of information

Opening & Closing

- Chapter 4 of the R&P has information on
  - Accessing the Lock Box
  - Opening the Pharmacy
  - Closing the Pharmacy

Daily/Weekly Tasks and Other Tasks

- The Pharmacy Task Checklist identifies important daily and weekly tasks. It's maintained on the Pharmacy page of Publix Connection @ *Pharmacy Operations > Pharmacy Task Checklist* and should be posted in your pharmacy.
- Chapter 4 of the R&P has information on Daily, Weekly, Monthly, Quarterly and Annual procedures.

Important Sources of Information

- Current information and assignments in the **Pharmacy Weekly Memo** – every Wednesday
- **Quarterly Newsletter** contains less critical information, yet helpful for your everyday needs
- **What's New** is a section on the Pharmacy page that provides you with announcements including upcoming CE programs and other company information
- **Patient Safety Newsletter** – quarterly newsletter providing you with important safety reminders

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name PPCQIP

Course Description QRE prevention, basic workflow, safety practices

How is QRE defined at Publix?
Definitions and examples of Level 1 QRE & Level 2 QREs

Definition	Examples
Level 1 = any departure from the appropriate dispensing of a prescribed medication that is not corrected prior to the delivery of the medication to the patient. This includes, but is not limited to, wrong patient, wrong drug, wrong strength and wrong direction errors.	• patient receives wrong drug in vial • patient receives another patient's prescription • patient receives wrong dosage, strength or form of a drug • patient receives product not re-constituted properly • patient receives substitute that is not therapeutically equivalent • patient receives drug, but DUR was bypassed • patient receives a medication with an easy open cap when not requested
A Level 2 = any departure from the appropriate dispensing of a prescribed medication that is corrected prior to the delivery of the medication to the patient, or is delivered to the patient, but does not fall under the Level 1 definition.	an error found in the pharmacy management system requiring the pharmacy associate to decline the prescription to make a correction prior to delivery of the medication to the patient an error when bagging the prescription that is caught before delivery to the patient patient receives prescription with the wrong prescriber name on the vial label patient receives prescription with incorrect pharmacy information on the vial label (e.g., phone #, address)

Highlights about the PPCQIP
Review Ch. 9 in the R&P for the details of the program. Here's some highlights:

- This is all about improvement!
- When we identify and analyze QREs, we are looking for improvements to our operations in order to reduce the risk of future QREs.
- Level 1 QREs should be documented and analyzed.
- Keep your discussions with pharmacy staff process-focused and avoid blaming or pointing fingers. Process improvements will help to reduce errors in the future.

Patient Safety Committee & Newsletters
Patient safety is our foundational, underlying goal. In support of that goal, we have a Patient Safety Committee that meets quarterly to evaluate QRE activity and trends to identify and implement company-wide improvements to patient safety standards. The team is made up of a Pharmacy Technician, Pharmacist, Pharmacy Supervisor, Pharmacy Operations Manager, Risk Management and other Pharmacy Operations associates.

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Part of the team's work includes publication of the quarterly patient safety newsletter – Patient Safety Starts with You! Each newsletter is published in the weekly memo and can be found on the Pharmacy page of Publix Connection @ *Pharmacy Operations > PPCQIP (QRE) > Patient Safety Newsletter*.

Quality Related Event (QRE) Prevention Techniques

- Prevention techniques are covered in the first half of Ch. 9 of the R&P
- Standards are expected to be maintained in your pharmacy
  - Environmental and Staffing Safety Practices
  - Drug Order and Drug Safety Practices
    - Special Attention Drugs
  - Drug Storage and Handling Safety Practices
  - Patient Information and Patient Communication Safety Practices

QRE Handling

Chapter 9 of the R&P identifies all steps for appropriately handling a discovered QRE. Know the process is there to reference when needed. Here's some highlights:

- The *Initial Report & Analysis Form* used to document Level 1 QREs (Form located on the Pharmacy page – *Pharmacy Operations > PPCQIP (QRE))*.
  - used to gather information and
  - evaluate QREs for identification of process improvements or prevention techniques.
- When handling a Level 1 QRE, the Pharmacist must follow these main steps:
  - contact any patients involved and potentially each patient's prescriber depending on the situation
  - notify the Pharmacy Supervisor and Risk Management (within a 24-hour period), and
  - possibly contact the Privacy Officer if PHI was disclosed.
- When communicating with patients about a potential QRE, consider these key tips (covered in much more detail in the Patient Safety CBT):
  - maintain eye contact and listen intently allowing the patient to share concerns
  - acknowledge the patient's concerns with something like, "I can see why you are concerned." and
  - assure the patient you'll be checking into the details of what happened.

Associate Counseling policies

- The PPCQIP program encourages self-reporting and quality improvement based on the reported information; however, there is a point at which counseling may be necessary.
- Be familiar with the counseling policies at the end of Ch. 9 of the R&P:
  - Pharmacist Counseling policy
  - RTP-Wrong Patient Counseling (for any pharmacy staff)
  - Failure to report a dispensed QRE

Summary

- **Safety starts with YOU!**
- A licensed pharmacists is responsible for
  - keeping patients' safe
  - identifying opportunities for improvement
  - implementing and maintaining a high standard of patient safety practices

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Module P2:
HIPAA Compliance

Module Description:
regulations and the importance of compliance to these regulations

Course Name	Course Description	Type	Length	Facilitator
HIPAA	HIPAA Privacy and Security regulations impacting retail pharmacies plus references to our policies	CBT	1 hr	Learning

How to Access: Log into Learning through Passport on your store's training workstation. Locate the Compliance CBT listed above on your To Do list and click the Start button.

Note: The course listed above must be taken before moving on to any other courses.

Legend
CBT – Computer based training

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Module P3:
Physical & System Workflow I

Module Description:
Complete overview of workflow and the Reception process

Course Name	Course Description	Type	Facilitator
Physical and System Workflow Overview	workflow from the time a Rx is dropped off to picked up and the basic processes involved along the way	ILT	Training Location RPh
Reception & Related Processes	a detail dive into reception processes including standard procedures and safety protocols	ILT	

<u>Legend</u>
ILT – Instructor-led training

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name Physical & System Workflow Overview

Course Description workflow from the time a Rx is dropped off to picked up and the basic processes involved along the way

Workflow summary

- Each workstation in the pharmacy is set up in a certain spot and certain functions are performed at each workstation to ensure prescriptions are filled efficiently while meeting quality, safety, and privacy standards.
- The process of filling a prescription is referred to as *workflow*. Workflow includes the physical workflow (workstation placement), as well as the flow of the data in EnterpriseRx.

Workflow details

Workflow	Basic functions
Reception	Reception is the "Drop Off" area for your patients. • Greet patient • Identify new patient information • Update existing patient information, if necessary • Accept prescription requests from patients • Document required information on prescription hard copy • Scan hard copy prescriptions into the pharmacy system • Identify date and time prescription to be ready for patient (Promise Date & Time) • Look for situations to discuss "By The Way" opportunities
Data Entry	• Enter prescription information into the pharmacy system • Ensure insurance is selected, if applicable
DUR/Pre-Verification (PV1)	• Pharmacist reviews and verifies the data entry • Pharmacist performs drug utilization review
Product Dispensing	• Print label for the vial • Verify label against the system for patient and drug prescribed • Pull product off the shelf • Ensure proper product selected by using accuracy scan • Select correct vial and cap • Count and label vial
Final Verification (PV2)	• Pharmacist reviews and verifies the prescription product is correct • Pharmacist packages the prescription in a bag with patient receipt and education
Release to Patient	Release to Patient is the "Pick up" area for your patients. • Ask patient for address to verify who they are at pickup • Verify patient information against bagged prescription information • Pharmacist counsels patient and releases prescription to patient • Ring up sale

Workflow Safety Tips

- Each workflow step used to fill a prescription includes standard procedures and safety practices that must be followed.
    - See the Pharmacy System Workflow and Procedural Safety Practices section of the Pharmacy R&P Guide, Chapter 9.
    - See the quick reference tip sheet on the Pharmacy page – *Pharmacy Operations > PPCQIP (QRE) > Workflow Safety Quick Reference*.

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name Publix Pharmacy – Reception & Related Processes

Course Description a detail dive into reception processes including standard procedures and safety protocols

Overview

- Accepting new prescription orders from our customers, *Reception,* provides us with many customer service, record keeping , and "By The Way" opportunities. "
- "By The Way" opportunities refer to going above and beyond for the customer and Publix by presenting additional information or more service options to our customers.
- This is accomplished while being respectful of the customer's time and having prescriptions ready when promised.
- Read the Reception Basics document on the Pharmacy page of Publix Connection – *Pharmacy Operations > Quick References > Workflow > Reception Basics*, which covers:
    the standardized process and procedures for accepting prescription order requests, and ways to inform our customers of our services in a professional and caring interaction.

Review of Publix's Patient Search Protocol

Steps - Patient Search Protocol

1. *Primary phone & Search Corporate*, if no results then
2. *4+2+DOB & Search Corporate*, if no results then
3. *Full last name, DOB & Search Corporate*, if no results then
4. add a new patient profile.
   *if there are many similar names, validate by date of birth or home address

Why important?

- for patient safety (narrows list of patients from the centralized database from which you must select)
- system performance (if search with too few letters or numbers, will slow the system down tremendously)

Reminders to follow the protocol

Reminders to follow this protocol are in the pharmacy

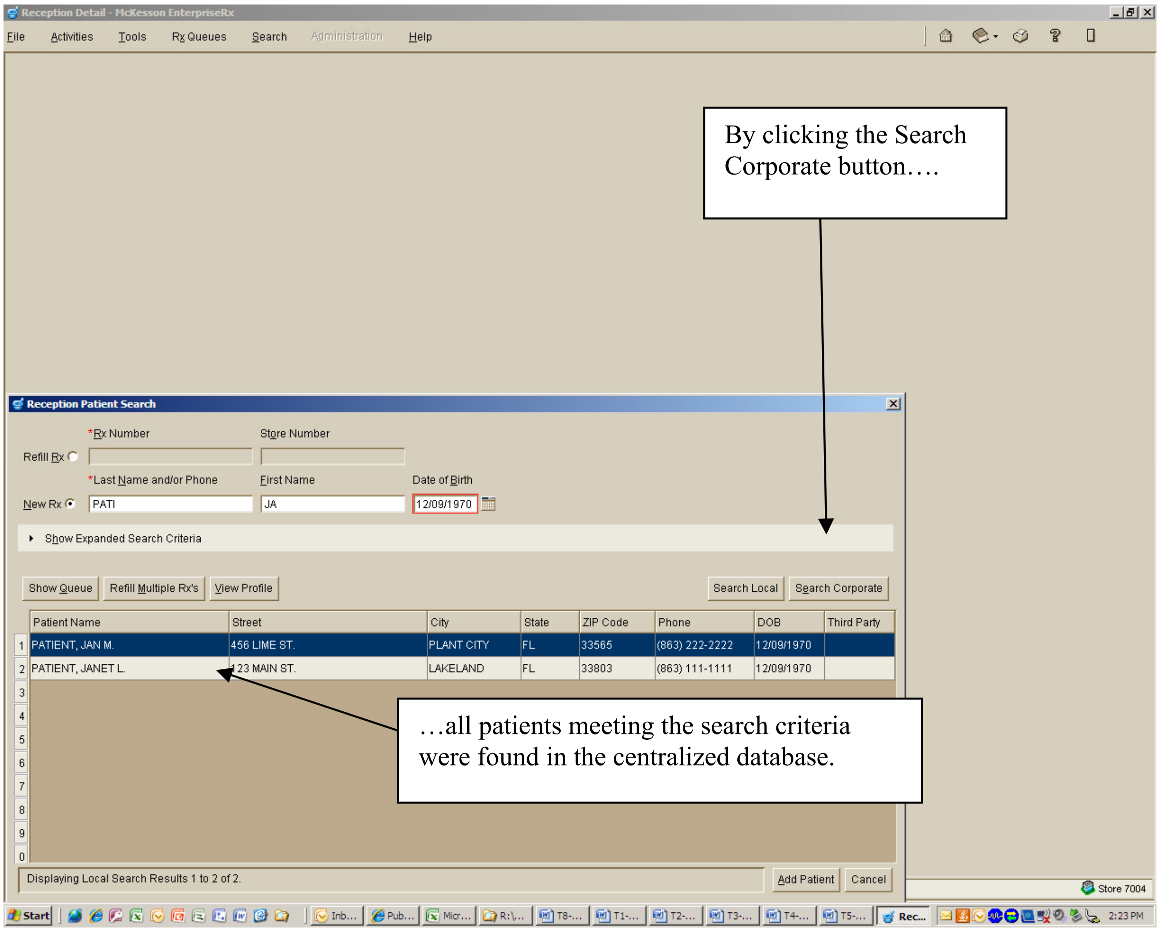
- Reception Basics sticker on the image scanner
- Flip-card on each monitor

Example of Patient Search Protocol

The patient you are looking for is Jan Patient, DOB 12/9/1970.

1. Say you first perform a *Primary Phone & Search Corporate* search and there are no results.
2. Then you perform a *4+2+DOB & Search Corporate* search and find Janet L. Patient, DOB 12/9/1970 and Jan Patient, DOB 12/9/1970. <u>You ask for her address</u> and she says it's in Plant City, FL. You have successfully found the correct patient ensuring patient safety and proper billing.

3. Next you would go to the patient profile and update the primary phone number for the patient to ensure that she'll come up with the *Primary Phone & Search Corporate* search next time.



Note: In this case, the store was located in Lakeland. If the Search Corporate button had not been selected, the Plant City profile would not have been presented. (Only the Lakeland profile for Janet L. Patient would have been presented.) This means you could have selected the wrong patient by simply assuming that Janet goes by Jan when in reality, it was a totally different patient. **Always use the Search Corporate button to ensure you are finding the right patient and to help avoid (and even identify) duplicate patient profiles in the system.**

Adding a patient to the system

If you perform standard search protocol and can't find the patient, then you can add a patient. You can add a patient from Reception, as well as from the Search menu in the pharmacy system.

Prescription documentation and retention

Documentation

- State and Federal regulations require that certain information be documented on prescription hard copies or in our pharmacy system relative to each prescription.
- Publix has contracts with third-party insurance plans that identify requirements for prescriptions in order for Publix to receive payment from the insurance plan.
- Review this information carefully in Reception Basics document referenced above.
- Also keep up with your state regulations.

Note: Having a scanned image of the hard copy and the ability to add Prescription Notes in our pharmacy system helps you ensure the proper documentation on each prescription.

Hard Copy tagging requirements

- *Hard Copy tag* = label containing information required by state law to be on the back side of a prescription hard copy
- Hard Copy tagging isn't done at Reception, but it impacts how a hard copy moves through workflow.

State	Hard Copy tag requirements
FL	Only controlled substance prescriptions (CII – CV) are Hard Copy tagged.
GA, AL, TN, SC, NC	All prescriptions are Hard Copy tagged.

Filing

State	Filing requirements
FL	• CIIs and CIII-CVs are filed separately in sequential Rx# order by 100. The Hard Copy tag is used to put the hard copies in sequential order. • Legends and OTCs are filed together by day.
GA, TN, AL, SC, NC	CIIs, CIII-CVs, Legends, OTCs are filed separately in sequential Rx# order by 100. The Hard Copy tag is used to put the hard copies in sequential order.

Retention

- file and maintain according to Publix's document retention guidelines (on Publix Connection *@ Resources > Records and Information Management >Retail records management > Pharmacy Retention Schedule*)
- Publix retention guidelines comply with state, DEA and CMS requirements

<u>Promise Date & Time (PDT)</u>

- accurate PDT = associates working on the right prescriptions at the right time to meet the patient's expectation
  - key to management of the workload in the pharmacy
  - key to Workload Balancing and Central Pharmacy – covered in Module 12
- inaccurate PDT = inefficiency, chaos, & unhappy customers

Currently only 5:55 is an approved code and used to identify that Rx in the queue as being worked on by the home store. No other PDT coding is approved for use.

<u>Workflow Safety Tips</u>

- Below is a summary of safety tips for Reception
  - ensure patient's name, DOB, and phone # written clearly on the hard copy
  - ensure drug name, strength and form written clearly on the hard copy
  - ensure all information on the hard copy is legible once scanned into the system
  - use standard search protocol to select the right patient in the system
    1. First search - *Primary phone & Search Corporate*, if not results
    2. Then search - *4+2+DOB & Search Corporate*, if not results
    3. Then search - *Full last name, DOB & Search Corporate* if not results, then
    4. Add patient to system
  - ask patient for updated medical, allergy, DUR Rx and OTC information
  - address any potential duplicate patient profiles (perform merges with caution to ensure allergies, medical conditions, and DUR Rx information remains on the merged profile

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Module P4:
Operating the Cash Register

Module Description:
How to use the cash register

Course Name	Course Description	Type	Facilitator
Cashier CBT	learn to use the register	CBT	Learning

Instructions

- Log into Learning through Passport on your store's training workstation. Locate the Cashier CBT listed on your To Do list and click the Start button.
- After completing the CBT your Training Location Pharmacist will train you on running the pharmacy register and have you practice this task.

Legend
CBT – Computer based training

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Module P5:
Physical & System Workflow II

Module Description:
Complete overview of Data Entry, DUR/PV1, Product Dispensing & Final Verification processes

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Course Name	Course Description	Type	Facilitator
Data Entry & Related Processes	a detail dive into each workflow process including standard procedures and safety protocols	ILT	Training Location RPh
DUR/PV1 & Related Processes		ILT	
Product Dispensing & Related Processes		ILT	
Final Verification & Related Processes		ILT	

Legend
ILT – Instructor-led training

Course Name Publix Pharmacy – Data Entry & Related Processes

Course Description a detail dive into data entry processes including standard procedures and safety protocols

Overview

Entering information from the prescription hard copy creates an electronic record enabling us to:

- electronically bill the prescription to insurance
- perform drug utilization reviews
- print vial wraps, bag tags, hard copy tags, patient receipt and education, MedGuides, etc.
- perform accuracy checks at Product Dispensing
- adjust inventory balances for amount of product used for prescriptions filled, and
- meet many other business and regulatory requirements.

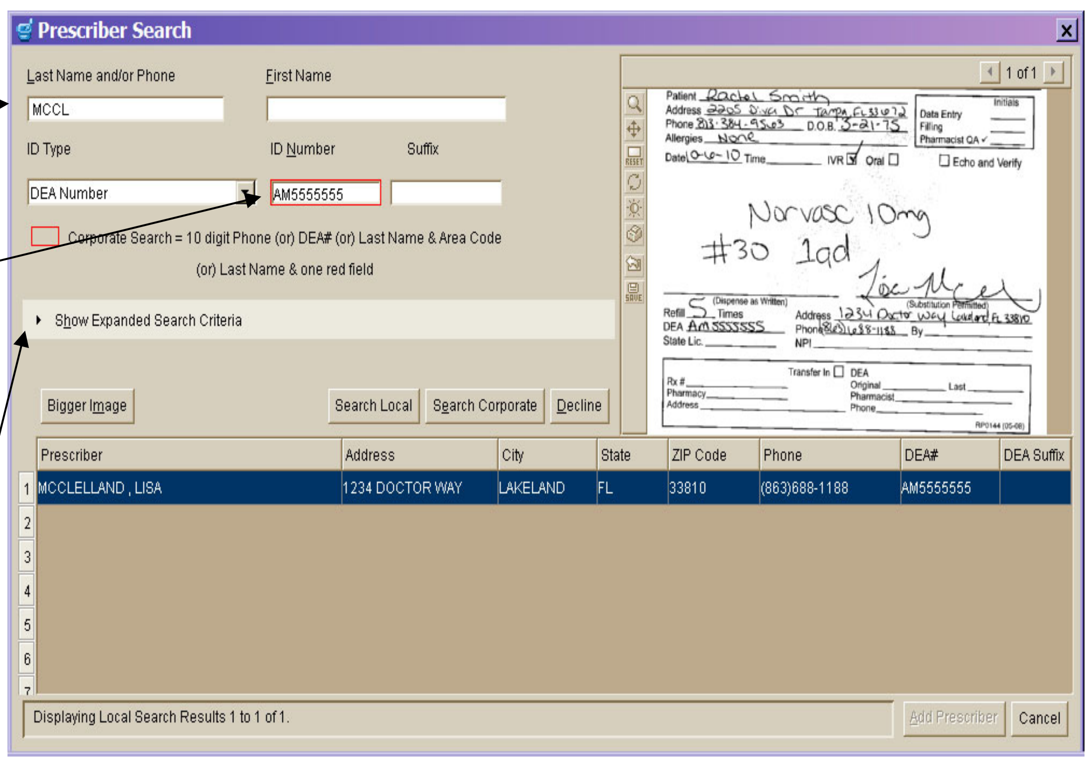
Prescriber Search Protocol

Steps - Prescriber Search Protocol

1. Perform a Local search (only requires the last name to perform the search), if no results then
2. Perform a Corporate search using the DEA#, if no results then
3. Add a new prescriber profile.

1. For *local search*, enter 4 letters of last name & hit Enter
2. For *corporate search* enter a DEA # (or other red-outlined field & hit **Search Corporate**.

You can select **Show Expanded Search Criteria** to search by the prescriber's address.



Potential duplicates
Search results may look like multiple profiles for the same prescriber. This could be
- separate line items for the different addresses at which the prescriber works, or
- multiple profiles for the same prescriber have been accidentally entered into the centralized database.

If you find that there are multiple profiles for the same prescriber, contact the Pharmacy Support Desk for assistance.

Why important?
- regulatory compliance
- billing accuracy
- prescriber is noted on the patient's vial wrap

Adding a prescriber profile
Prescriber profiles can be added from workflow or directly using the Search menu.

Drug Search Protocol

Steps - Drug Search Protocol
1. first 5 letters of drug name and
2. strength.

For example, if searching for Lisinopril 10 mg enter **LISIN10**. If you follow the protocol and the drug doesn't come up, a Corporate search may need to be performed. (See course on Product and Inventory Profiles in Module P7.)

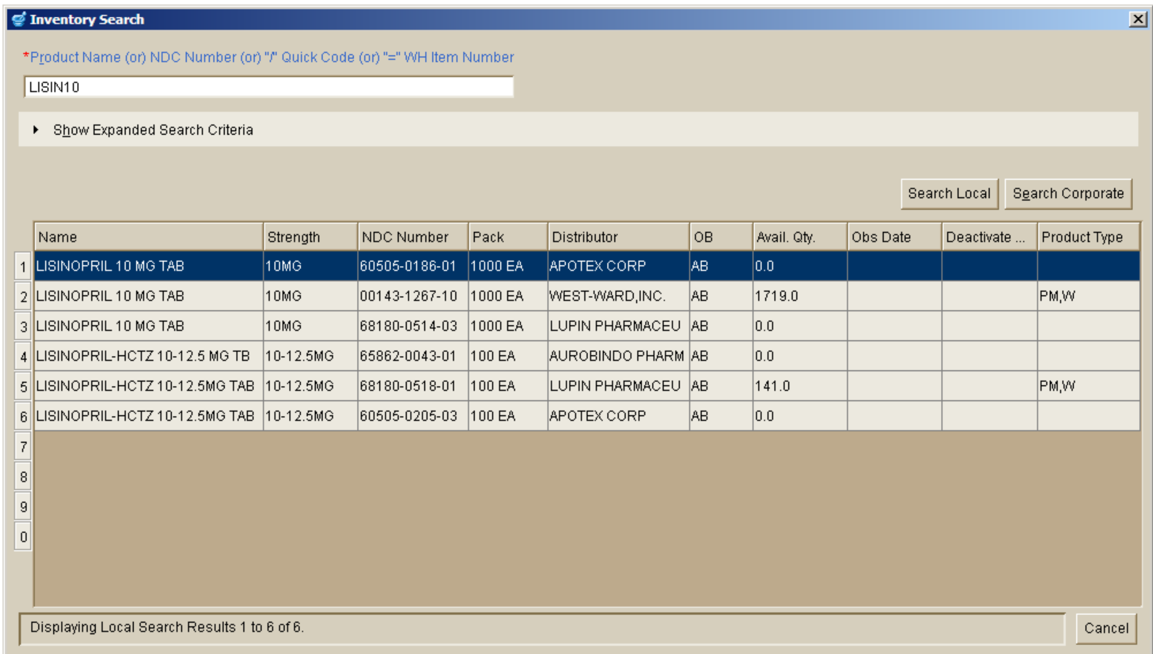
Why important?
- for patient safety while in workflow (narrows list of products to the drug name & strength to minimize risk of selection error)
- system performance (if searching with too few letters or numbers, will slow the system down tremendously, especially if doing a Corporate search)

Reminders to follow the protocol
Reminders to follow this protocol are in the pharmacy
- Flip-card on each monitor

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Example of Drug Search Protocol

Searching by LISIN10 narrows your search minimizing you risk of selecting the wrong drug.



Inventory Search

*Product Name (or) NDC Number (or) "/" Quick Code (or) "=" WH Item Number

LISIN10

Show Expanded Search Criteria

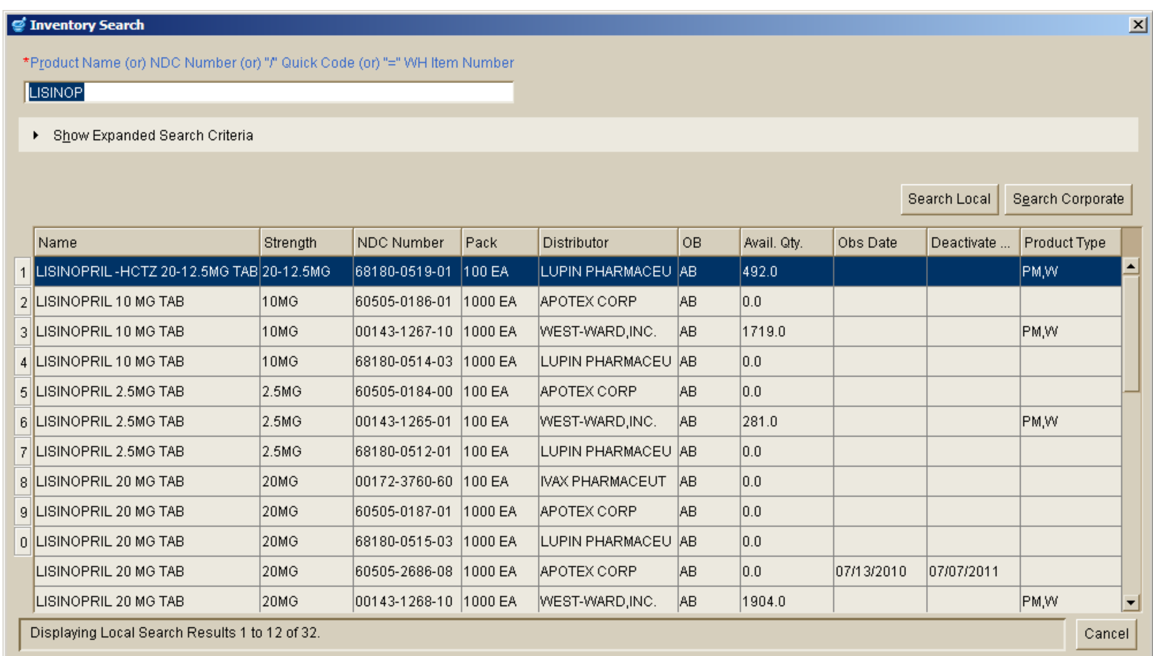
Search Local | Search Corporate

	Name	Strength	NDC Number	Pack	Distributor	OB	Avail. Qty.	Obs Date	Deactivate ...	Product Type
1	LISINOPRIL 10 MG TAB	10MG	60505-0186-01	1000 EA	APOTEX CORP	AB	0.0			
2	LISINOPRIL 10 MG TAB	10MG	00143-1267-10	1000 EA	WEST-WARD,INC.	AB	1719.0			PM,W
3	LISINOPRIL 10 MG TAB	10MG	68180-0514-03	1000 EA	LUPIN PHARMACEU	AB	0.0			
4	LISINOPRIL-HCTZ 10-12.5 MG TB	10-12.5MG	65862-0043-01	100 EA	AUROBINDO PHARM	AB	0.0			
5	LISINOPRIL-HCTZ 10-12.5MG TAB	10-12.5MG	68180-0518-01	100 EA	LUPIN PHARMACEU	AB	141.0			PM,W
6	LISINOPRIL-HCTZ 10-12.5MG TAB	10-12.5MG	60505-0205-03	100 EA	APOTEX CORP	AB	0.0			
7										
8										
9										
0										

Displaying Local Search Results 1 to 6 of 6.

Cancel

Searching by LISINOP doesn't narrow your search enough and increases chances of selecting the wrong drug.



Inventory Search

*Product Name (or) NDC Number (or) "/" Quick Code (or) "=" WH Item Number

LISINOP

Show Expanded Search Criteria

Search Local | Search Corporate

	Name	Strength	NDC Number	Pack	Distributor	OB	Avail. Qty.	Obs Date	Deactivate ...	Product Type
1	LISINOPRIL -HCTZ 20-12.5MG TAB	20-12.5MG	68180-0519-01	100 EA	LUPIN PHARMACEU	AB	492.0			PM,W
2	LISINOPRIL 10 MG TAB	10MG	60505-0186-01	1000 EA	APOTEX CORP	AB	0.0			
3	LISINOPRIL 10 MG TAB	10MG	00143-1267-10	1000 EA	WEST-WARD,INC.	AB	1719.0			PM,W
4	LISINOPRIL 10 MG TAB	10MG	68180-0514-03	1000 EA	LUPIN PHARMACEU	AB	0.0			
5	LISINOPRIL 2.5MG TAB	2.5MG	60505-0184-00	100 EA	APOTEX CORP	AB	0.0			
6	LISINOPRIL 2.5MG TAB	2.5MG	00143-1265-01	100 EA	WEST-WARD,INC.	AB	281.0			PM,W
7	LISINOPRIL 2.5MG TAB	2.5MG	68180-0512-01	100 EA	LUPIN PHARMACEU	AB	0.0			
8	LISINOPRIL 20 MG TAB	20MG	00172-3760-60	100 EA	IVAX PHARMACEUT	AB	0.0			
9	LISINOPRIL 20 MG TAB	20MG	60505-0187-01	1000 EA	APOTEX CORP	AB	0.0			
0	LISINOPRIL 20 MG TAB	20MG	68180-0515-03	1000 EA	LUPIN PHARMACEU	AB	0.0			
	LISINOPRIL 20 MG TAB	20MG	60505-2686-08	1000 EA	APOTEX CORP	AB	0.0	07/13/2010	07/07/2011	
	LISINOPRIL 20 MG TAB	20MG	00143-1268-10	1000 EA	WEST-WARD,INC.	AB	1904.0			PM,W

Displaying Local Search Results 1 to 12 of 32.

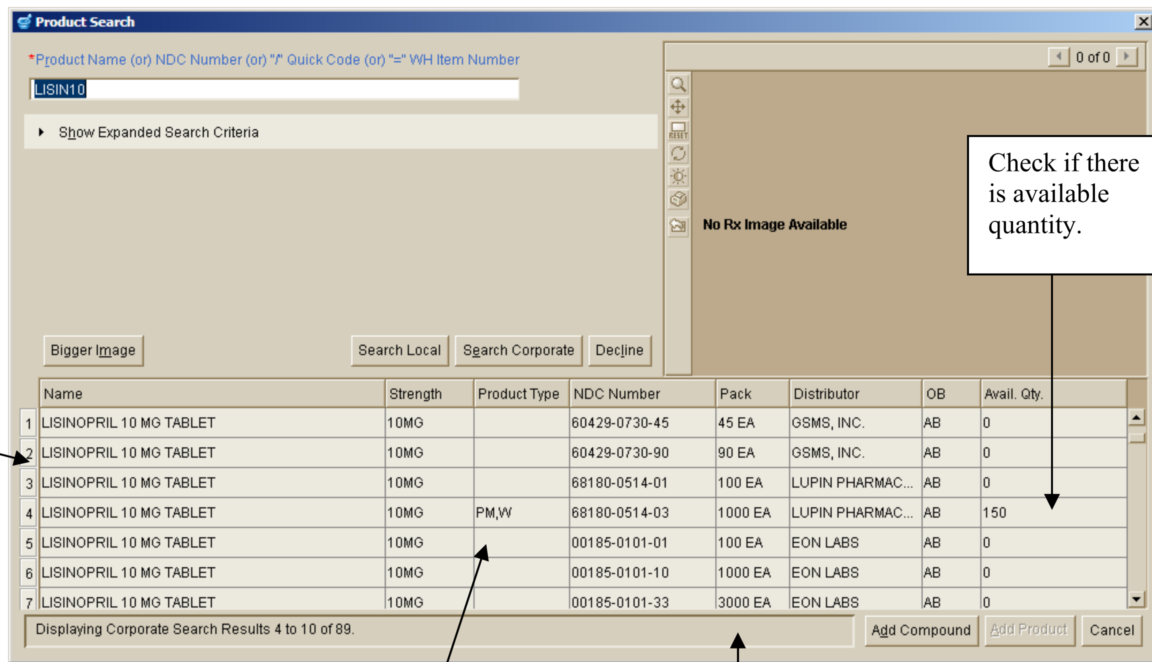
Cancel

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Drug Selection Protocol

Steps - Drug Selection Protocol

1. select correct product as written on the prescription
   - medication (generic or brand)
   - strength, and
   - dosage form
2. select product that is in stock
3. whenever possible, select Publix's preferred product (to maximize profit)
4. when selecting generics, select a generic with the same Orange Book (OB) rating as the brand



Check if there is available quantity.

Pick the correct strength and form

- PM = preferred product ("pick me")
- W= warehouse product
- Blank = not preferred

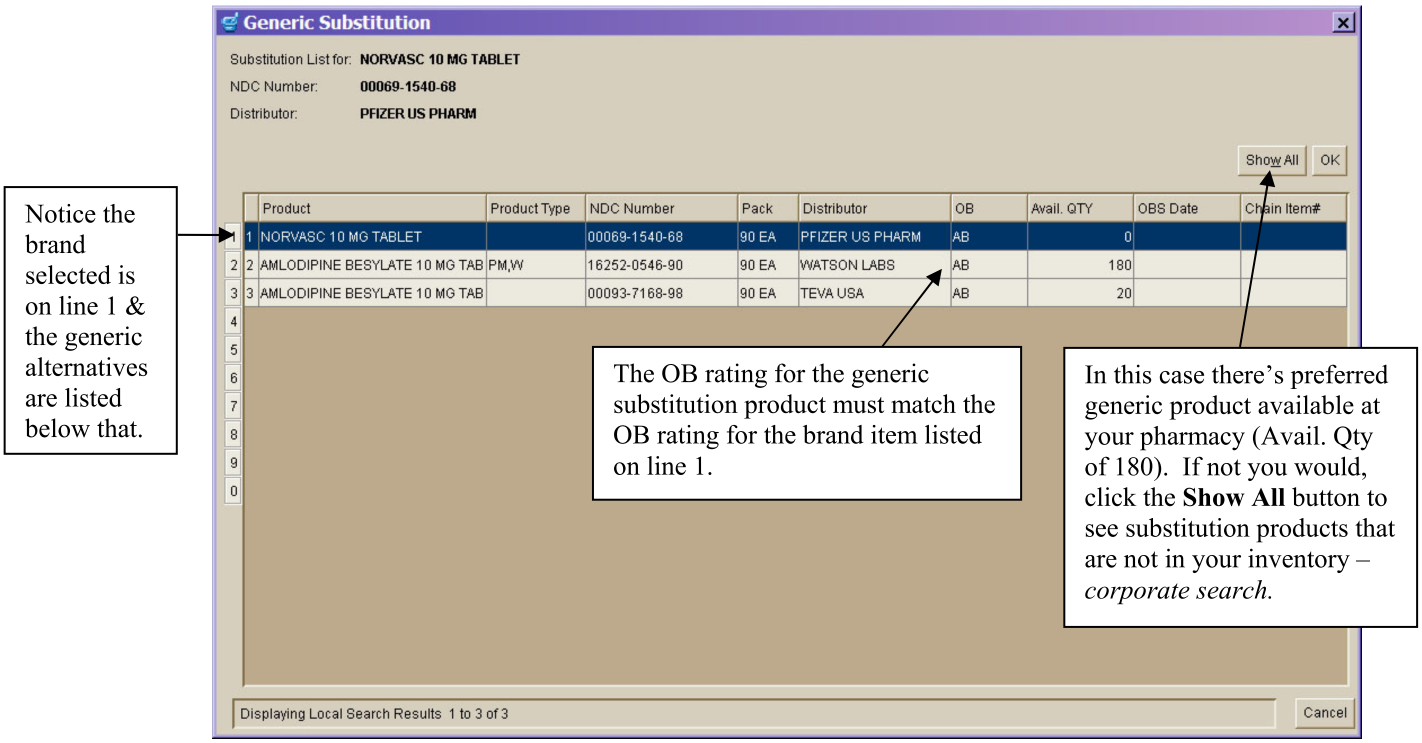
Check for pack size that's the same as the written quantity.

Why important?

- for patient safety
- for maximizing gross profit

Other drug selection tips

- A generic substitution screen will automatically present itself when choosing a multi-source drug.
- If there's only one NDC in inventory (product that you have ordered before) that meets the search criteria, EnterpriseRx will select that NDC. At this point to select an alternative, re-do the search and search Corporate.



Data Entry Detail

Icon used to make corrections to data already entered.

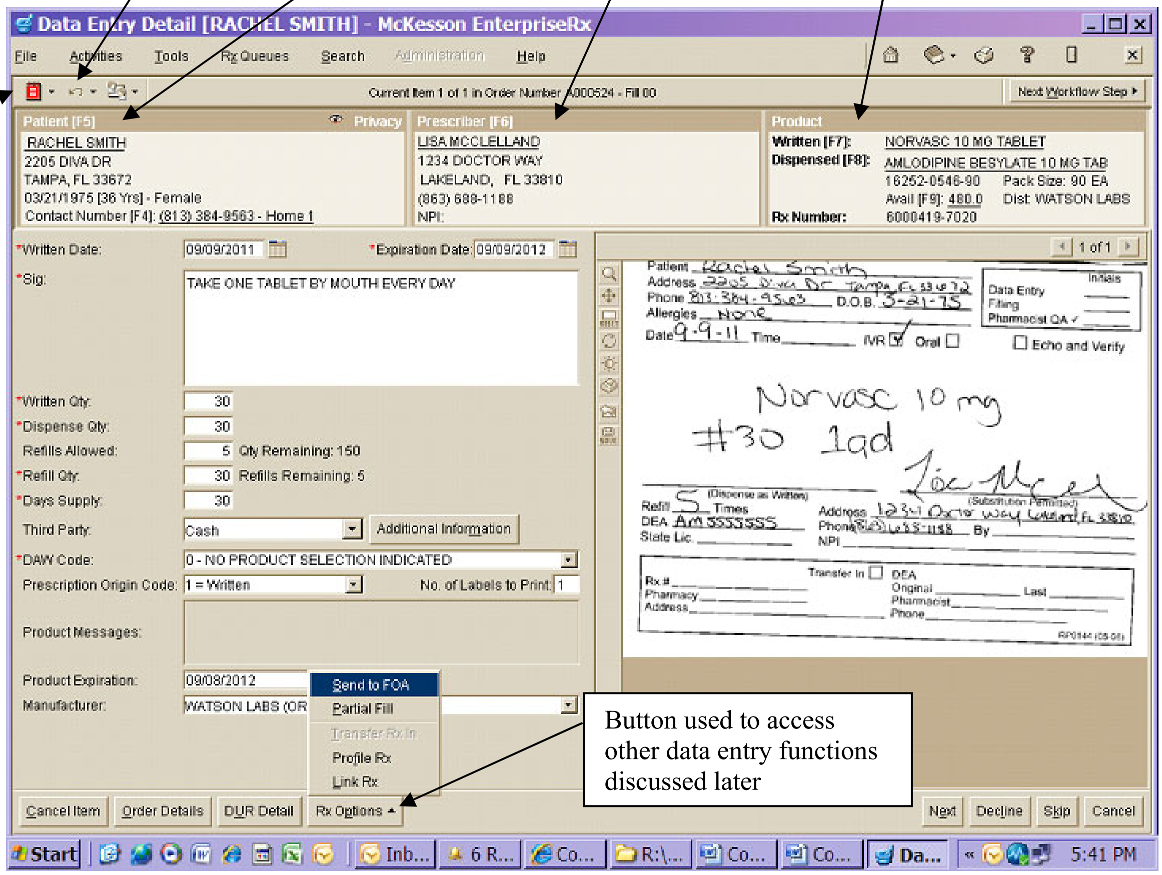
Patient as selected in Reception with hyperlink to profile.

Prescriber as selected in Data Entry with hyperlinks to profile.

Written & dispensed product as selected in Data Entry with hyperlinks to profiles.

Icon to access/ update Rx, Tx patient notes.

Quantity section



Button used to access other data entry functions discussed later

Tips to complete Data Entry

- **Always TAB through the fields on the Data Entry screen!**
  - The TAB button moves the cursor to the next field and
  - causes the system to calculate information in certain fields (e.g., sig code conversion, quantity calculations).
- SIG Rules are located on the Pharmacy page @ *Pharmacy Operations > Quick References > Workflow > SIG Rules.*
  - SIG Codes are used to calculate the days supply.
  - Free forming directions requires the days supply to be manually calculated.
  - Special SIG codes are included in the Product Message section on the screen.

- Quantity section
  - Refill Qty = Written Qty
    - auto-populated
    - **editing of the Refill Qty field is rare and should not be done unless absolutely necessary**
    - **if edit this field, must check the remaining calculations on the screen**
  - Days Supply
    - calculated using SIG Code and Dispensed Qty
  - Quantity Remaining
    - auto- calculated and not editable
    - = Refills Remaining x Refill Qty
  - Remaining Refills
    - auto- calculated and not editable
  - See the Flip-card monitor for Days Supply Tips
- Third-party selection and billing
  - For basic third-party billing concepts/information, see Ch. 13 of the R&P.
  - For COB tips, refer to the Flip-card on the monitors.
  - DAW codes automatically populate
    - National Council on Prescription Drug Programs (NCPDP) established standard billing practices including Dispense As Written (DAW) codes.
    - If you question the DAW code, call the Pharmacy Support Desk.
  - Prescription Origin Code
    - auto-populated for electronic prescriptions
    - defaults to "Written" for all other prescriptions
    - **must manually adjust the Origin Code for faxed or telephoned Rxs**
- Notes can be accessed or added.
  - Prescription Notes – a note that applies to all fills of the Rx
  - Transaction Notes – a note that applies only to the current transaction of the Rx
  - Patient Notes – a note for the patient profile regarding the patient
  - Prescriber Notes – a note for the prescriber profile regarding the prescriber
  - Third Party Notes – notes added by Pharmacy Operations about the third party plan being used

<u>Handling Pre-edits</u>

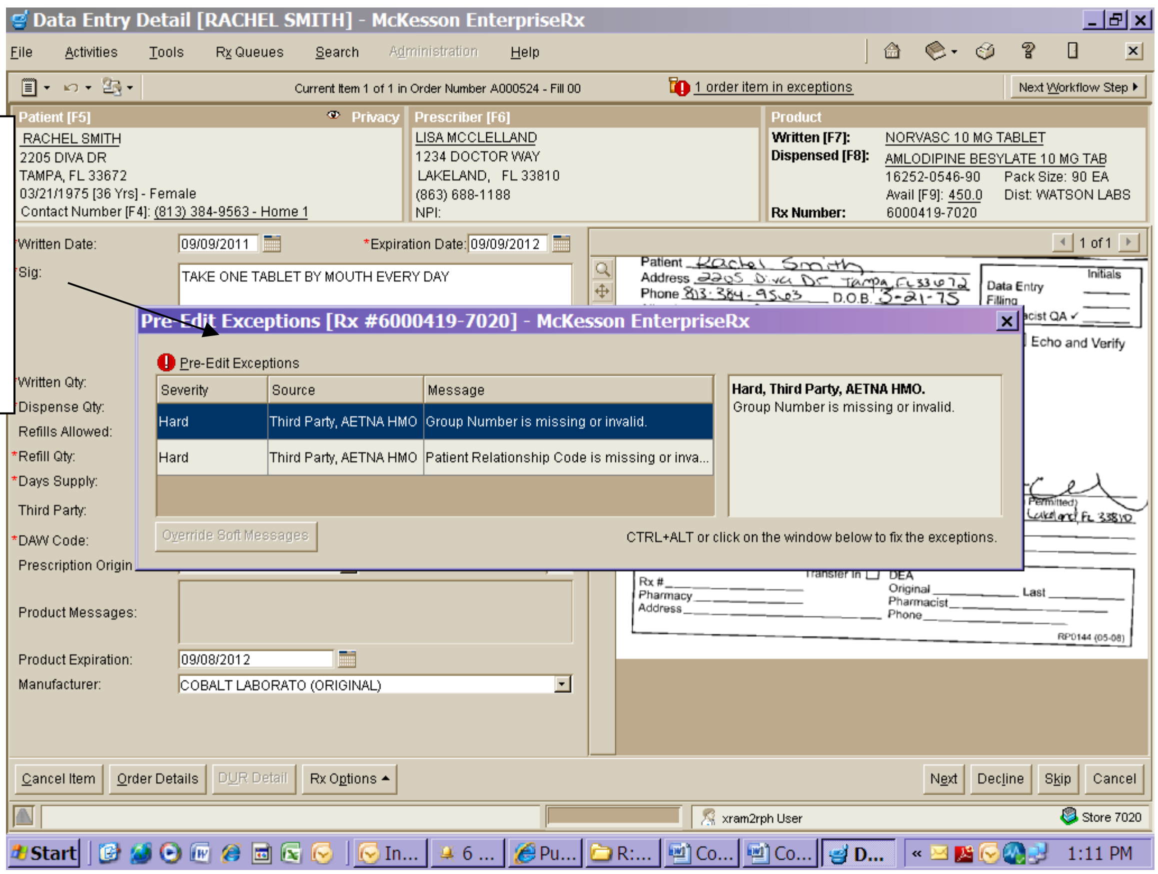
- Pre-edits are edits set up within EnterpriseRx.
- Review and response to the edit or correction of issue causing the edit is required to complete Data Entry.
- **The pre-edit popup cannot be removed by selecting the "x" in the top corner of the pop-up.**
- When the popup is on your screen, work can still be completed on the screen. It does not deactivate the workflow screen in the pharmacy system.
- Move the popup on the screen by clicking on the bar at the top of the popup and dragging the popup to another location on the screen.

Types of pre-edits

Type of Pre-Edit	How to Respond
Informational	Read the information on the edit and respond as necessary. To move forward, perform the next step in workflow and the box will simply disappear.
Soft	Read the information on the edit, respond as necessary, and then click the **Soft Edit Override** button on the popup. Enter any number in the override field and hit **Enter**. To move forward, perform your next step in workflow and the box will simply disappear.
Hard	Read the information on the edit and respond to the specific hard halt message (e.g., fix information in the patient profile). To move forward, correct the problem then perform your next step in workflow and the box will simply disappear.

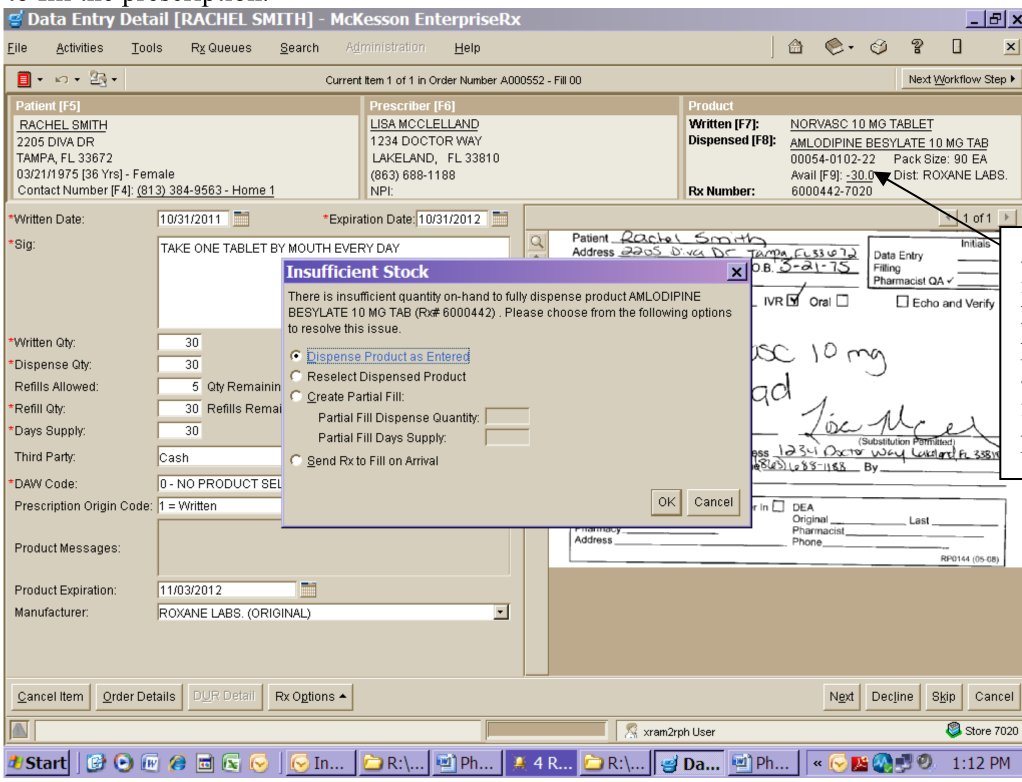
Sample screen with a pre-edit exception

This is a hard pre-edit exception and must be corrected before moving forward in workflow.



Handling the insufficient stock reminder

Another popup that may present it self before you can finalize Data Entry is the Insufficient Stock popup. This presents itself if the product you chose does not have a sufficient on-hand quantity to fill the prescription.



Avail field identifies how much product is available to fill this prescription

The popup will give you 4 choices. When looking at the choices, you should consider the amount of product that is available (Avail field – see above) to fill the prescription you are working on.

Pop-up Option	Explanation
Dispense Product as Entered	This option will move the Rx into the next stage of workflow with a negative balance on-hand. Note: This may be used when there is plenty of stock on the shelf and the on-hands are wrong in the system. **Correct the on-hands immediately.**
Reselect Dispensed Product	This option will allow you to choose a different product to dispense, if there is another product with available quantity.
Create Partial Fill	This option will send a partial fill transaction to the next stage of workflow, allowing you to dispense a small portion of the Rx until more product arrives. Once you finish filling the partial fill, a completion fill will go to the Fill on Arrival queue while waiting for additional product to arrive. Note: The Fill on Arrival queue holds prescriptions waiting to be filled by product that is on order. You will learn more about this queue in a later module of this training program.
Send Rx to Fill on Arrival	This option will send the entire Rx to the Fill on Arrival queue while waiting for additional product to arrive.

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Important note: Always inform the customer if we do not have enough medication in stock to fill the prescription. Neighboring pharmacies may have the medication in stock.

How to ensure proper reimbursement for a prescription

You can provide a high quality product and provide premier service to our customers, only to find out that your pharmacy is not getting paid properly for the effort because of billing errors. Below is a list of basic billing requirements that need to come together to ensure the pharmacy is reimbursed properly for prescription claims:

1. Ensure all appropriate information is included on the face of the hard copy (or within a Prescription Note in the pharmacy system) considering the schedule of the drug and Federal and state requirements.
2. Prescriptions with a DAW 1 should always have a *brand medically necessary* notation on the face of the hard copy – requirements differ by state law.
3. Prescriptions with a DAW 2 should always have a *Pt Requests Brand* notation on the face of the hard copy.
4. *Use as directed* Sigs should be avoided. If used, the maximum daily dose should be included on the hard copy.
5. Days supply must be properly calculated.
6. Ensure appropriate patient signatures are captured at Release to Patient.
7. Prescriber NPI, DEA and state license # need to be included on the claim, but also need to be CORRECT

Workflow Safety Tips

- Below is a summary of safety tips for Data Entry
  - Use the *5 letter plus strength* drug search protocol
  - perform product search based on drug name, then ensure you select the correct strength and form
  - check product notes for special sig codes
  - use sig codes whenever possible (instead of free form sigs) so system can calculate days supply
  - tab through data entry fields to allow the system to calculate certain fields properly
  - review all data entry components against the hard copy before hitting NEXT

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name DUR/Pre-Verification (PV1)

Course Description a detail dive into DUR/Pre-Verification (PV1) processes including standard procedures and safety protocols

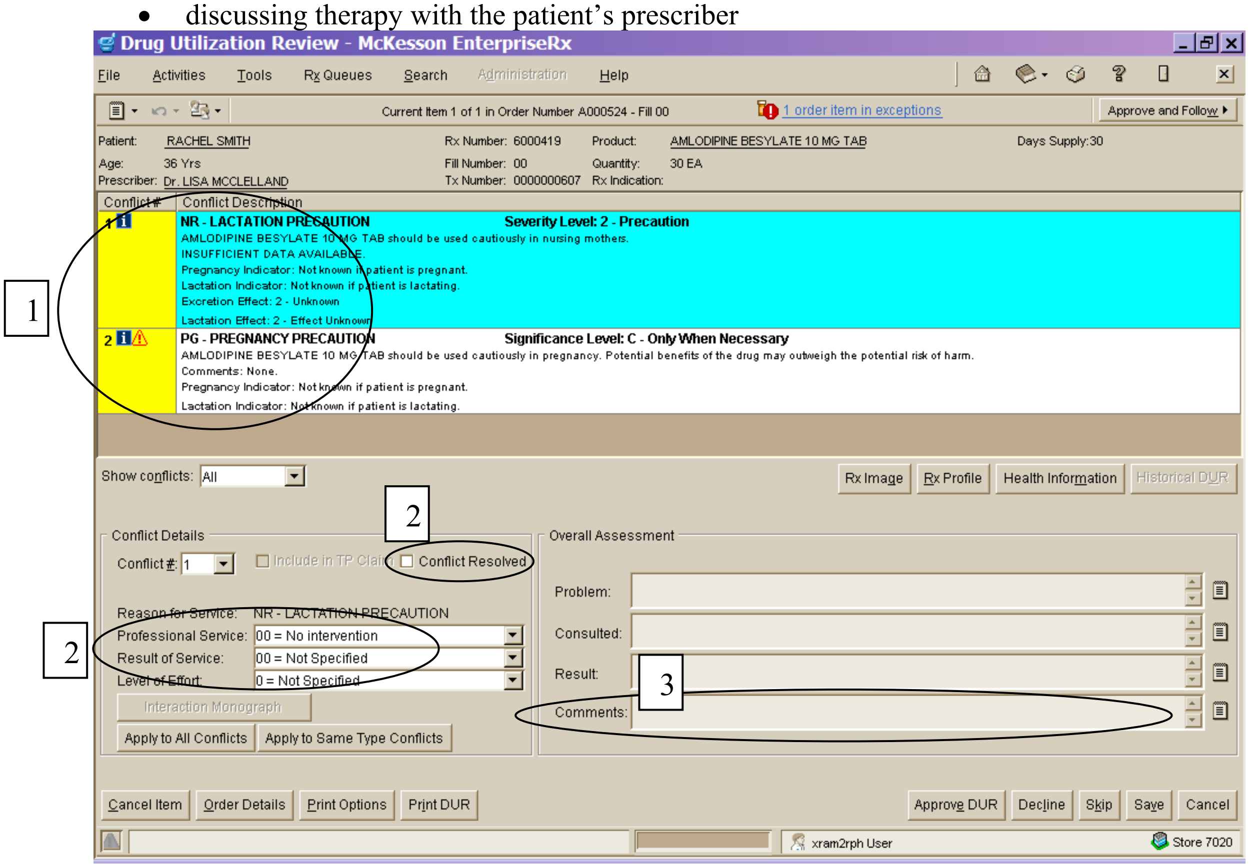
Graduate Intern Note: Please remember, the DUR/PV1 processes can only be completed by a licensed pharmacist. While in training and working as a graduate intern, you must only shadow a licensed pharmacist to learn the process for when you become licensed.

Overview

- All Drug Utilization Reviews (DURs) in PV1 are presented before dispensing.
- Pharmacist Verification 1, also called Pre-Verification 1 (PV1) occurs before Final Verification - presented on all initial fills and first refills.

DUR Protocol

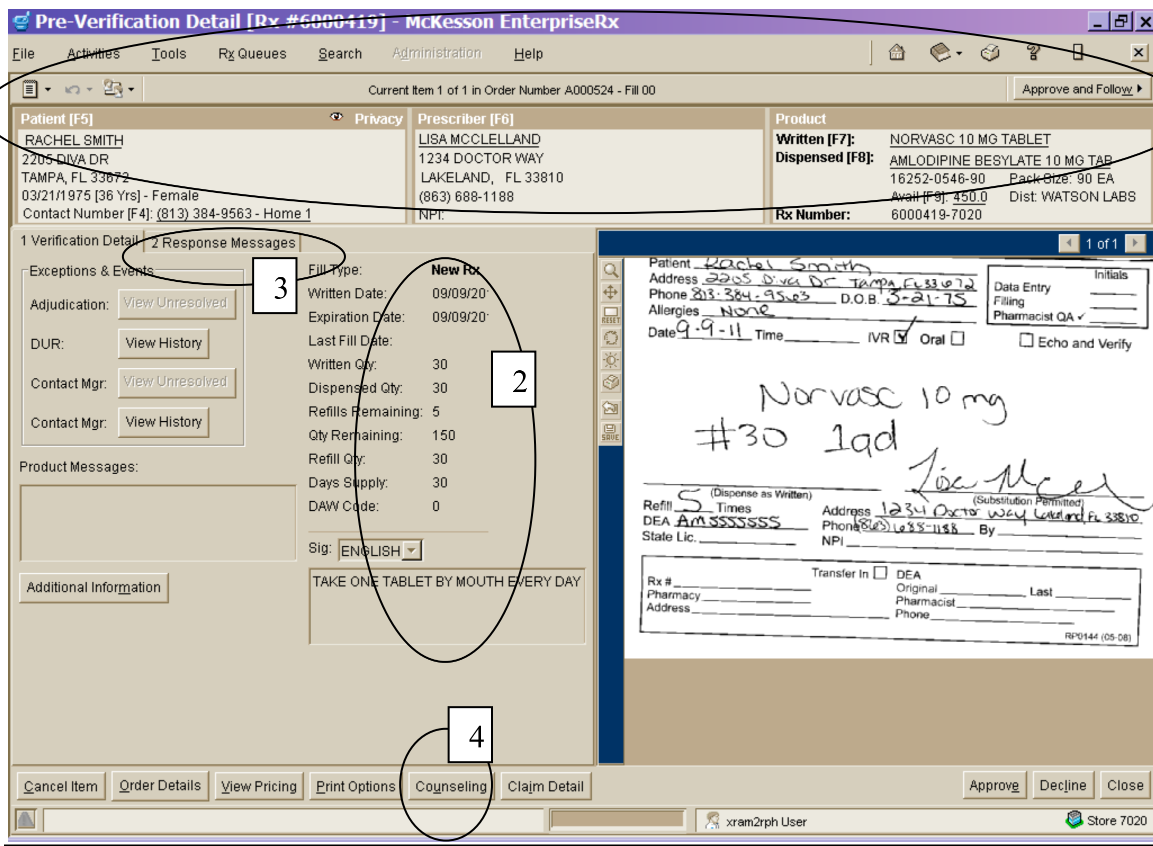
1. Review all conflicts considering the impact to patient safety. Depending on the DUR, consider:
   - selecting Rx Image to view the hard copy
   - accessing the patient's profile to review Rxs, allergy info, and/or medical info
   - referencing drug resources including Clinical Pharmacology
   - discussing therapy with the patient's prescriber



2. If the DUR is a TP DUR, you must select a Professional Service code and a Result of Service code, then check the Conflict Resolved box..
3. For significant DURs involving an approval or a decline, document the results of your review in the Overall Assessment section of the DUR screen.

PV1 Protocol

1. Verify the following along the top of the screen to the hard copy:
   - Patient name & DOB
   - Prescriber name & location
   - Written drug name, strength and form (verify dispensed drug is appropriate substitute)
2. Verify the following along the left of the screen to the hard copy:
   - Written date
   - Written quantity
   - Refills remaining (new Rx vs. 1st refill)
   - Days supply
   - SIG
3. As necessary, click on the Response Message tab to evaluate any TP response messaging.
4. Add Counseling notes (regarding patient safety or communication) as necessary.
5. Use the Decline button to correct as necessary and continue, otherwise Approve with your RDAC.



DUR/PV1 Tips

- Work these throughout the day keeping workflow moving by working from the DUR/PV1 Activity.
- **Do not use** the Apply to All Conflicts or Apply to Same Type Conflicts buttons on the DUR screen.
- PV1 may at times be worked by another store or Central Pharmacy (you'll learn more in Module 12 about this).

Workflow Safety Tips

- Below is a summary of safety tips for DUR/PV1
  - review all DURs presented
  - adequately notate reasons for DUR overrides and use professional service and results of service codes
  - verify the information on the hard copy with the data entry elements in the system
  - always confirm DOB against the hard copy before approving even if the name is familiar

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Course Name Publix Pharmacy - Product Dispensing & Related Processes

Course Description a detail dive into product dispensing processes including standard procedures and safety protocols

<u>The Vial Wrap</u>

- The vial label is the portion of the vial wrap that goes on the vial
- The bag tag is the portion of the label that eventually is placed on the outside of a bagged Rx

Dispensed drug name (written drug name underneath if different)

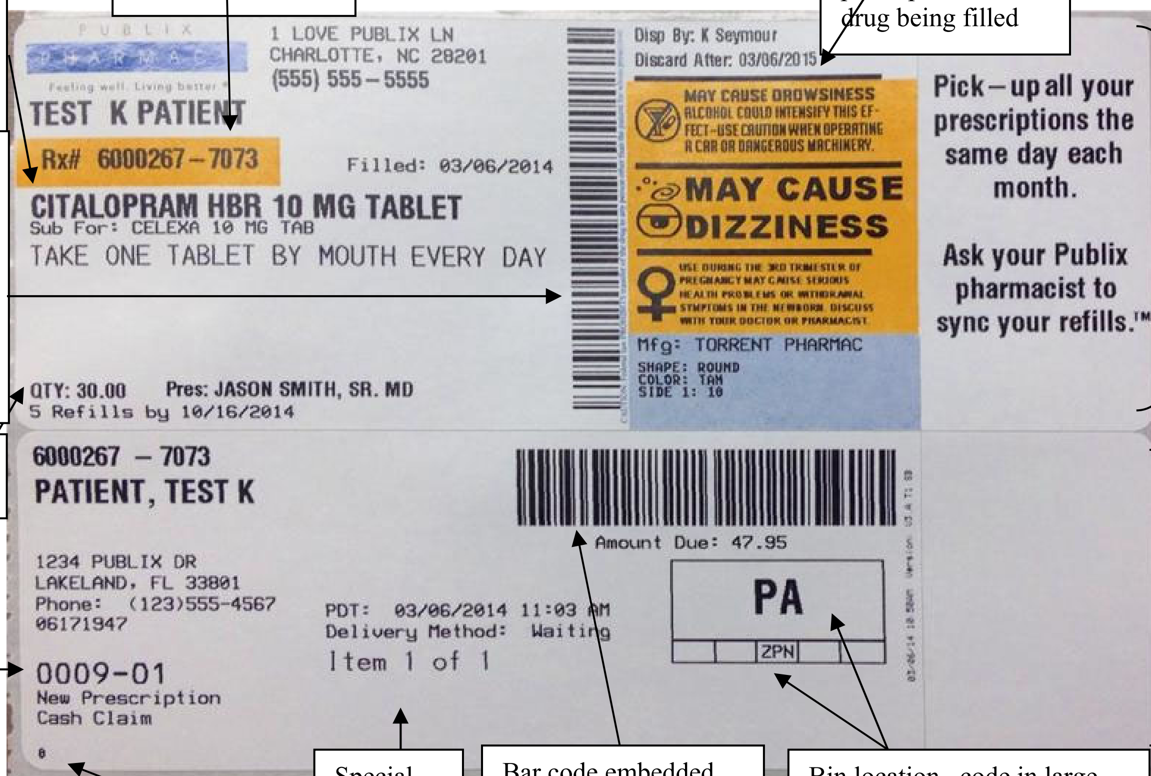
Rx # with Store #

Warning labels - print specific to the drug being filled

Bar code embedded with the Rx# - used to search a queue, complete accuracy scan, & start a refill in Reception.

Dispense quantity

End portion of NDC # – used to verify product when selecting from the shelf



Vial label

Bag tag

Balance on-hand (prior to this fill) used to help identify inventory discrepancies between shelf and system

Special notations here – like *Easy Open Caps*

Bar code embedded with Rx info and pricing info - used to scan Rx at POS

<u>Bin location</u>– code in large box where the Rx should be filed in Will Call (based on the patient's last name unless it is in a special bin location such as a mix or refrigerated item)

<u>By The Way Codes (BTW)</u> in the small boxes - used by associates at POS to provide patient with additional information or share additional services (see monitor flip cards for current BTW codes)

<u>Product Dispensing Protocol with Tips</u>
These steps are important for patient safety and efficiency.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Label prints for the patient once prescription accessed in Product Dispensing.
Batch printing is not permitted to avoid confusion among different labels for different patients.
Labels for a patient will print – so if one patient has 3 prescriptions ready to fill, then 3 labels will automatically print.</td></tr>
<tr><td>2</td><td>Verify the patient name and drug printed on the label matches the Patient and Product fields on the top of the Product Dispensing screen, as well as the prescription hard copy image on the screen.</td></tr>
<tr><td>3</td><td>Use Vial Wrap to select the correct product from the shelf referencing the drug name and NDC.
The NDC will ensure you are selecting the right strength and form of the drug</td></tr>
<tr><td>4</td><td>Verify that the product is not expired by reviewing the expiration date.
If the Expiration date is less than a year from now, enter the expiration date from the product into the Product Expiration date field on the Product Dispensing screen.</td></tr>
<tr><td>5</td><td>Complete the accuracy scan in EnterpriseRx by scanning the prescription barcode on the vial wrap and the stock bottle NDC barcode.
The accuracy scan is set to work down to the pack size.
Do not override an accuracy scan until you completely verify the situation.
Check the hard copy, product selected in the system and the stock bottle carefully before deciding to override an accuracy scan.
If you find that the scan isn’t working, yet you know you have the correct product, ensure to call in the issue to the Pharmacy Support Desk to research further.
The accuracy scan must be performed for only one prescription at a time, meaning: you must always perform the accuracy scan, count, then label the prescription before performing an accuracy scan for another prescription.</td></tr>
<tr><td>6</td><td>Verify the image of the pill on the Product Dispensing screen matches that of the product you scanned.</td></tr>
<tr><td>7</td><td>Count and label the prescription, ensuring to pay attention to special notations on the bag tag (i.e., Easy Open Caps).</td></tr>
<tr><td>8</td><td>Adhere bag tag to the bag tag slip (do not apply bag tags directly to the bag).
For refrigerated and reconstituted products, use the MIX or REFRIG stamp next to the appropriate bag tag slip.</td></tr>
<tr><td>9</td><td>Place the bag tag slip inside the clear zip style prescription bag with the btag tags facing the completely clear side of the bag.</td></tr>
<tr><td>10</td><td>Place prescription bag and prescription vial(s) in a basket and pass to the Final Verification pharmacist and click Next in the system to ensure the prescription continues through workflow.
There must be no more than the authorized number of baskets on the counter at any time between Product Dispensing and Verification. Baskets are to be lined next to one another, not stacked on top of one another. See the chart below for the approved basket limits.
<table>
<tr><th>Baskets</th><th><1,000 Rx’s/week</th><th>1,001-2,000 Rx’s/week</th><th>>2,000 Rx’s/week</th></tr>
<tr><td>Between PD & FV</td><td>5</td><td>8</td><td>10</td></tr>
<tr><td>Total Baskets in Pharmacy</td><td>12</td><td>24</td><td>24</td></tr>
</table></td></tr>
</table>

Workflow Safety Tips

- Below is a summary of safety tips for Product Dispensing
  - print one patient's labels at a time (do NOT batch print)
  - select product off shelf using drug name and NDC
    (Don't assume the accuracy scan will confirm the product anyway. If the wrong bottle is pulled, it is now on the counter and could possibly be used after the accuracy scan.)
  - dispense one Rx at a time
  - perform accuracy scan for one prescription, then count > label > put in a basket > hit NEXT
  - don't leave any unlabeled vial sitting on the counter for more than 2-seconds
  - use the image of the pill to verify that it matches the product you are counting
  - check expiration on stock bottle against system
  - put the completed prescription (bag tag/bag tag slip) in a basket and pass to the *Verification* workstation
    Note: There must be no more than the authorized number of baskets on the counter at any time between *Product Dispensing* and *Verification*. Baskets are to be lined next to one another, not stacked on top of one another
  - put away stock bottles in a timely fashion or ensure segregated from other stock on the counter

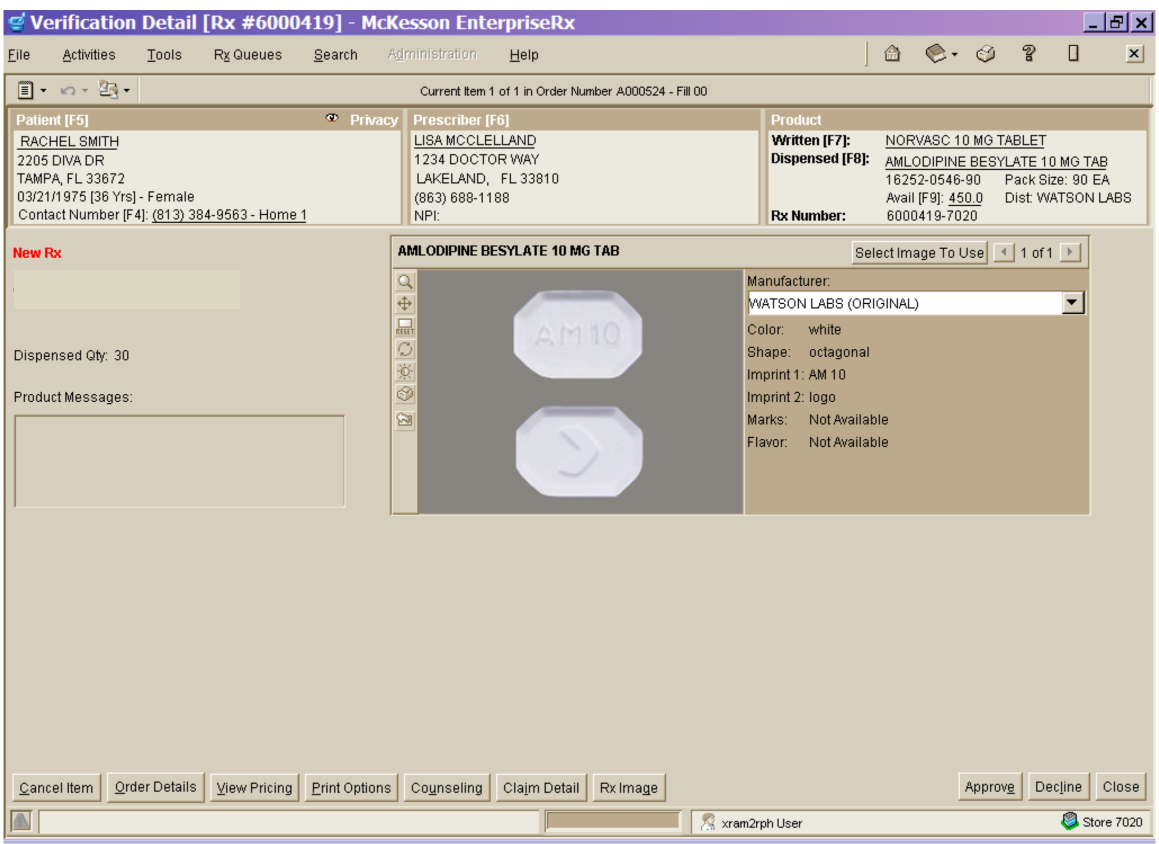
Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name	Final Verification
Course Description	a detail dive into final verification processes including standard procedures and safety protocols

Graduate Intern Note: Please remember, the Final Verification processes can only be completed by a licensed pharmacist. While in training and working as a graduate intern, you mush only shadow a licensed pharmacist to learn the process for when you become licensed.

<u>Overview</u>
Final verification = ensuring the prescription was properly dispensed

<u>Final Verification Protocol</u>
1. Scan the filled prescription vial to pull up the prescription in queue
   - Scanning the vial ensures the system pulls up the correct prescription in the system removing the chances of a pharmacists "selecting" the wrong prescription from the queue
2. Check that contents of the bottle match image and image information on the screen
3. Evaluate the dispensed quantity considering product features such as unit dose and administration route.
4. Use the Decline button to correct as necessary and continue, otherwise approve with your RDAC.



Bagging the Rx

1. Always complete verification and bag one order at a time. Retrieve Patient Receipt and Education (PRE), as well as, any of the following if applicable - Medication Guide, LDM printouts, Notice of Privacy Practices. Then fold them in half with the PRE on the outside.
2. Compare the patient's name on the vial wrap, bag tag slip, and PRE at the time of assembling the bag.
3. Place the patient materials inside the prescription bag with the patient information at the bottom facing forward (with PHI protected by the opaque part of the bag), and the blank portion at the top, visible from the logo side of the bag.
4. Slide the bag tag slip in the back with the face of the tags facing out on the clear side of the bag.

Example of bagged prescription:

Front view (#3 above)	Back view (#4 above)
	

Filing Bagged Rxs

Bin locations

- important that the bagged prescriptions placed in the will call bins adequately secure our patients' protected health information (PHI)
- most prescriptions are filed in will call bins, but special areas are noted in chart below
- the bin location is printed on the bag tag so you know where to store the completed prescription

Bin Type	Bin Name	Location
Normal	A-Z	Fits in alphabetized will-call bins
Oversized	OZ1	Oversized prescriptions that won't fit in the will-call bins are located in a designated area in your pharmacy.
Refrigerated	RF1-RF49	Refrigerated prescriptions are located in the refrigerator in your pharmacy.
Reconstituted	MIX1-MIX49	Prescriptions that need to be reconstituted before releasing to the patient are located in a designated area in your pharmacy.
Ship	SHIP1	Prescriptions that are shipped/mailed to a patient are located in a designated area in your pharmacy.
Delivery	DLVR1	Prescriptions that are awaiting delivery to the patient are located in a designated area in your pharmacy.

Protocol for filing completed prescriptions

1. Ensure the patient name on the Patient Receipt and Education (PRE) matches the patient name on the bag tag. **If they do not match, immediately resolve.**
2. Using the bin location printed on the bag tag and the patient's last name, file the completed prescription in the alphabetized will-call bins or in other designated areas in your pharmacy (e.g., oversized prescriptions).

   Note: A completed prescription stored in the refrigerator or one that must be reconstituted will not be in the bag. You must stamp the bag with *MIX* or *REFRIG* next to the bag tag and file the bag with the PRE at will-call. (Central Fill refrigerated or reconstitute Rxs must be removed from the bag and put in the appropriate special handling area while only the bag with paper contents is filed in Will Call.) When the patient arrives, the prescription will be retrieved from the appropriate area in your pharmacy.

Special Order OTCs

To special order OTCs use the Special Order Form.

Workflow Safety Tips

- Below is a summary of safety tips for Final Verification
  - verify and package one order at a time
  - scan Rx label first to bring up Rx that is being verified…do NOT select off of the screen
  - always visually verify product image on the screen with the product in the vial
  - evaluate the dispensed quantity considering the product features (like unit dose and administration route)
  - retrieve PRE, LDM and med guides for each order and bag that order prior to moving to the next order
  - compare patient name on label, bag tag and PRE at the time of bag assembly

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Module P6:
MethGuard Training

Module Description:
regulations and the importance of compliance to these regulations

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Course Name	Course Description	Type	Length	Facilitator
MethGuard	DEA regulations regarding pseudoephedrine products including product types, conversion charts, logbook requirements, state requirements plus references to our policies	CBT	1hr	Learning

How to Access: Log into Learning through Passport on your store's training workstation. Locate the Compliance CBT listed above on your To Do list and click the Start button.

Note: This course must be taken before moving on to any other courses.

Legend
CBT – Computer based training

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Module P7:
Physical & System Workflow III

Module Description:
Complete overview of RTP processes and patient, prescriber & drug profiles

Course Name	Course Description	Type	Facilitator
RTP & Related Processes	a detail dive into Release to Patient processes including standard procedures and safety protocols	ILT	Training Location RPh
Patient Profile	a detail dive into patient, prescriber and drug profiles	ILT	
Prescriber Profile		ILT	
Drug Profiles		ILT	

Legend
ILT – Instructor-led training

Course Name: Publix Pharmacy – Release to Patient & Related Processes

Course Description: detail dive into Release to Patient processes including standard procedures and safety protocols

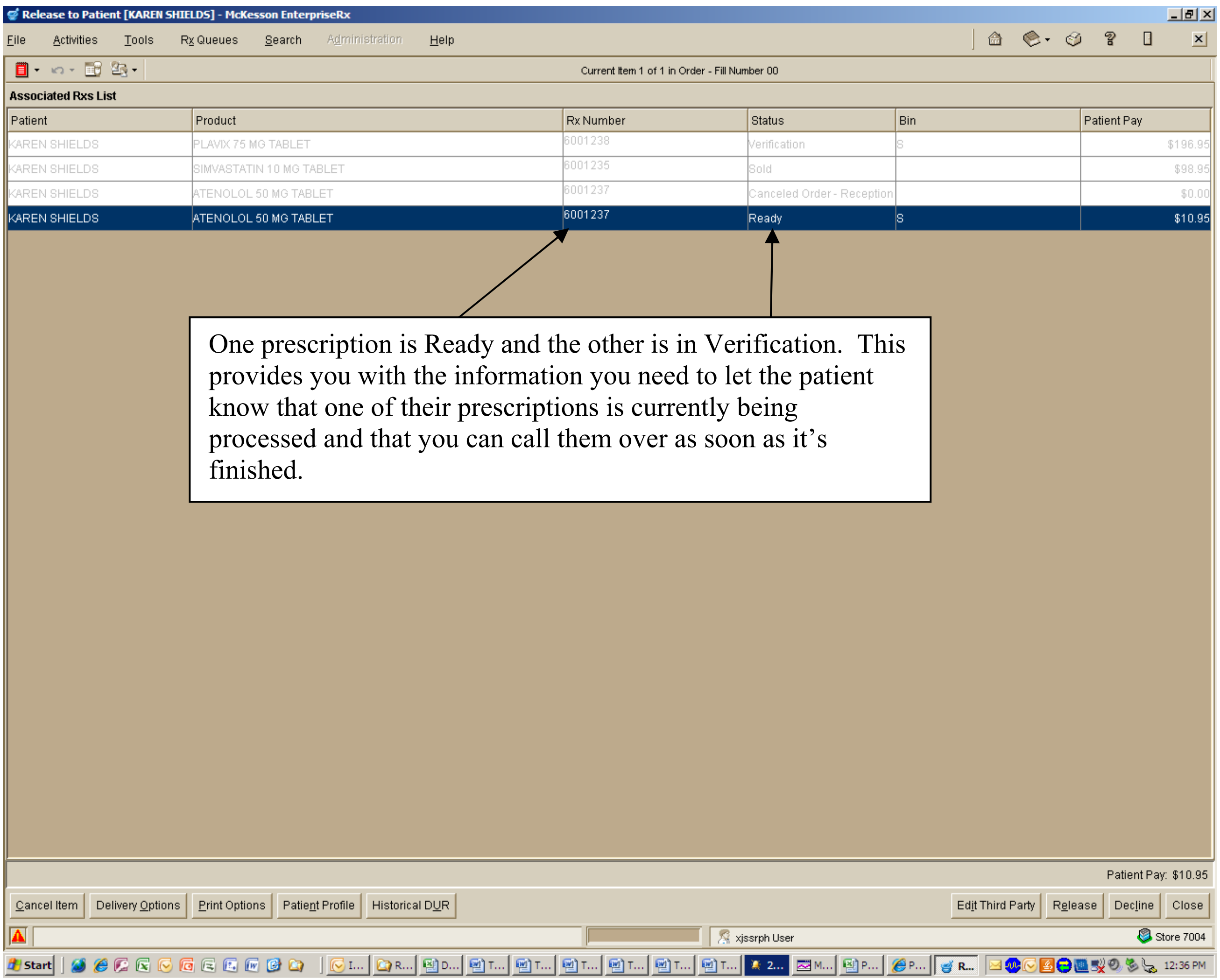
<u>Release to Patient (RTP) Protocol</u>
This is extremely important protocol for patient safety.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Welcome the patient. Ask for:
• patient's name and
• number of prescriptions being picked up.</td></tr>
<tr><td>2</td><td>Find the prescription(s) in the system and note the bin location.</td></tr>
<tr><td>3</td><td>Pull the prescription(s) from the designated pharmacy location.</td></tr>
<tr><td>4</td><td>Verify that you pulled the right prescription(s) for the patient.
• Ask for the patient's address, then make sure the patient's name and address matches the information on the prescription bag tag and medication vials.
Note: This is an extremely important step in verifying you have the right prescription(s) for the patient. The patient should TELL you their address, DO NOT read the address to the patient and ask if it's correct. Also, if the address doesn't match the system, DO NOT change the address unless you have verified that the profile you are pulling up is in fact that patient's profile (e.g., maybe they moved recently).</td></tr>
<tr><td>5</td><td>Is the Rx for a refrigerated or reconstituted product?
<table>
<tr><th>If</th><th>Then</th></tr>
<tr><td>Yes</td><td>1. pull the appropriate patient's Rx from the refrigerator or reconstituting area
2. verify and initial the Rx label and then bag the Rx.
Note: A pharmacist must always perform step #2 whether another pharmacist or a technician performs step #1.</td></tr>
<tr><td>No</td><td>Go to next step.</td></tr>
</table></td></tr>
<tr><td>6</td><td>Verify that the prescription was properly billed.</td></tr>
<tr><td>7</td><td>Release the prescription in the system.
• arrow through each of the prescriptions in the order and read all Transaction (Tx) notes and Counseling notes that pop up on each prescription.
Note: There may be very important information for you as the pharmacist to go over with the patient.
• Counsel the patient.
Note: Each state has different counseling rules. Refer to the rules in your state regarding the offering of counseling to your patients.
• If the Auto-Refill popup box comes up, let the patient know that you will automatically refill their prescriptions when they are due. Let the patient know we will call them when the prescriptions are ready.</td></tr>
<tr><td></td><td>Click the Release button which will prompt the signature capture device requiring
• <u>new</u> patients to acknowledge receipt of our Notice of Privacy Practices as required by HIPAA regulations, and
• all patients to acknowledge (as required by third-party contracts)
  o receipt of prescriptions and counseling was offered
  o eligibility for insurance benefits claimed (if used insurance), and
  o treatment for on-the-job injury (if used workers compensation insurance)</td></tr>
</table>

Step	Action
8	Ring the sale on the register by scanning each prescription's bag tag. • Scan all prescriptions, even $0 co-pays!
9	Thank the patient and invite them back.

Find the prescription in the system

When searching for the patient in the RTP queue, you may find that only part of a patient's order is ready.



What if you can't find the patient at all when you search for them in RTP? It could mean that no prescriptions are ready or maybe the customer is at the wrong Publix Pharmacy.

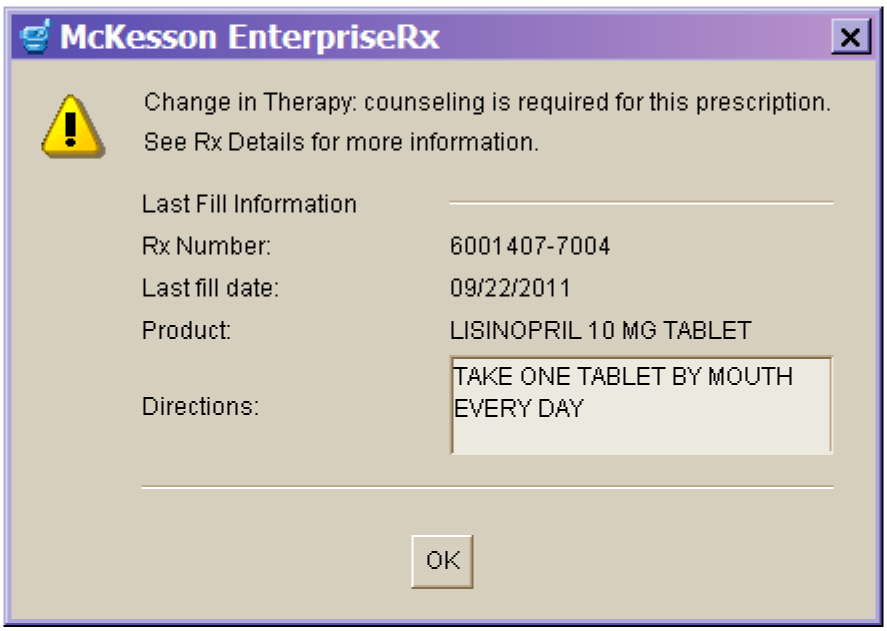
- Use the All Rx Status (F3) function to search for this patient in your system.
- If you still cannot find a prescription for the patient, you'll need to access the patient's profile to determine if it's been filled at another location.

Ensure to review all Transaction and Counseling Notes!

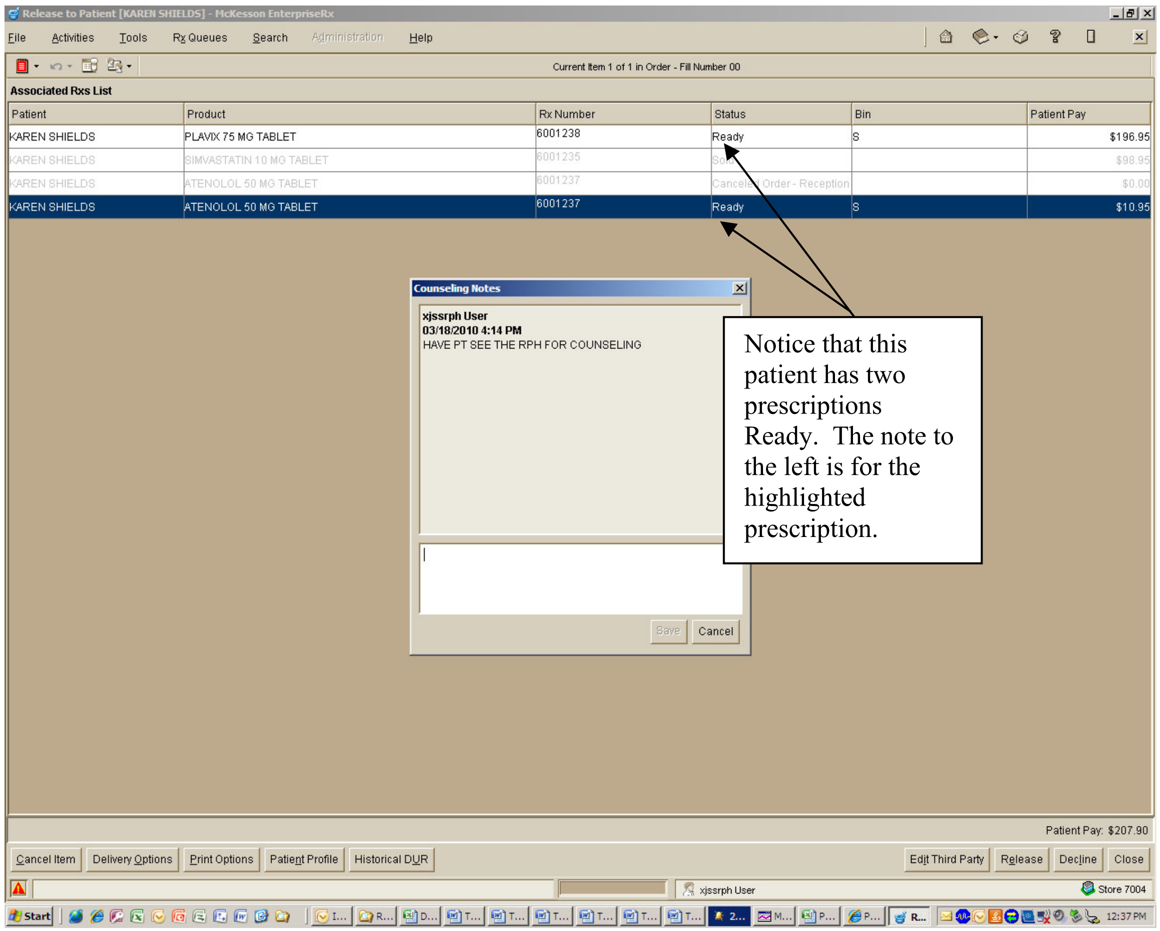
- Important notes may be presented in different formats at RTP and you must carefully review them prior to providing the medication to the patient.
- Once you access the Release to Patient screen containing a patient's prescriptions, you **must** click on each prescription in the Ready status (you can also use your arrow button to move through the prescriptions on the screen) to see the Transaction and Counseling notes associated with <u>each</u> prescription.

  <u>Types of Transaction and Counseling Notes</u>

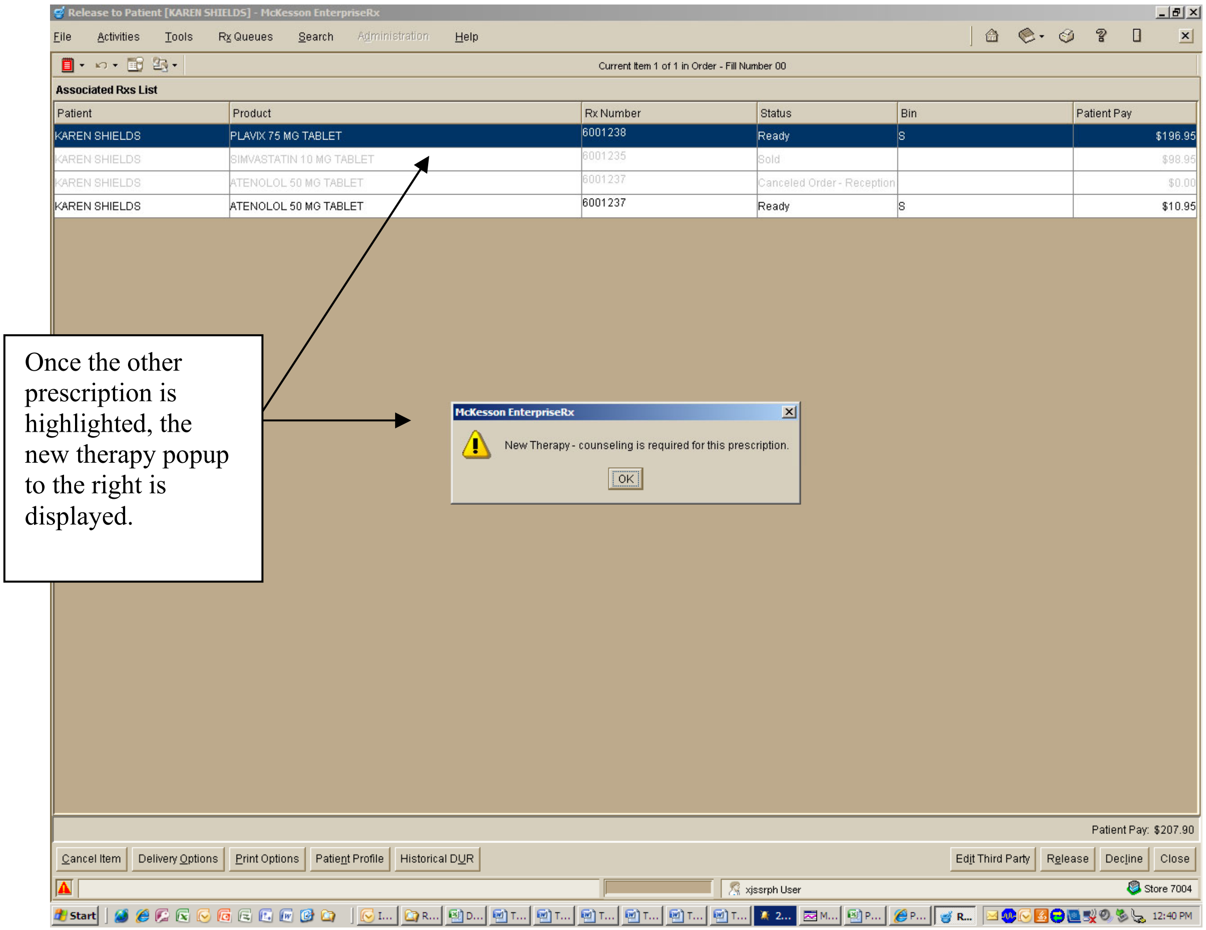
  This message may present itself when the directions on a prescription have changed since the last prescription for this medication.



This is an example of a Counseling Note which was added to the patient's prescription by the Pharmacist earlier in workflow. When you access the patient's prescription in RTP, this Counseling Note pops up on the screen. It's associated with the highlighted prescription.



In this example, when you highlight the other prescription that is in Ready status you'll see an important note for that prescription. In this case, the system presents a New Therapy popup which indicates that this is a new medication for this patient. The Pharmacist should be made aware of this so that counseling can take place.



Patient counseling

- Refer to Ch. 9 of the Pharmacy Reference and Procedures Guide for counseling tips.
- It is important to always review Tx Notes for counseling points that may have been identified during the prescription filling process.
- Pharmacists must offer counseling for all new patients and patients with new prescriptions.
- Always inform the patient to give you a call if any questions come up later.

Release First, then Ring the Sale!

- It's imperative to Release the prescription in the pharmacy system first, and then ring up the sale on the register. This ensures we:
  - capture the signature acknowledgements required by law and third-party insurance contracts, and
  - avoid future filling and billing issues caused by not completing the transaction correctly in the pharmacy system.

New Patient HIPAA Acknowledgement
Below is a sample of what comes up on the signature capture device for new patients to acknowledge receipt of our Notice of Privacy Practices as required by HIPAA regulations. We often refer to this as the *HIPAA Acknowledgement.*

HIPAA Acknowledgement

My signature directly below as the patient, guardian, or the authorized personal representative of the patient certifies, on behalf of the patient, that this pharmacy has provided me with a copy of Publix Super Market's *Notice of Privacy Practices (Notice).* The *Notice* explains the uses and disclosures of protected health information (PHI) that may be made by Publix as well as the patient's rights and Publix's duties with respect to PHI.

☐ I am the patient, guardian, or authorized representative

Accept **Refuse** **Cancel**

Patient Insurance/Counseling or Third-Party Acknowledgement

Below is a sample of what comes up on the signature capture device for all patients to acknowledge that

- prescriptions were received
- counseling was offered
- insurance eligibility is claimed (if using insurance), or
- treatment for on-the-job injury is claimed (if using workers compensation insurance)

Prescription Counseling and/or Insurance Claim Acknowledgement

By my signature directly below as the patient or the authorized personal representative of the patient, I certify that this Publix Pharmacy has offered patient counseling on the medication dispensed and that the prescription identified below was received. I understar that I have a duty to update my health information and that my health care provider who prescribed my medicine is solely responsible for the management of my drug therapy. **Prescription Drug Coverage and Patient Authorization:** By my signature below I certi that the information contained on my prescription benefits card or reported to the Publix Pharmacy is correct and that the person for whom the prescription was written is eligible f the benefits claimed. I authorize the release of all information regarding the prescription a d claim to which it corresponds to Publix Super Markets and as Publix deems necessary to

Scroll Bar

I'm receiving rx #

● I accepted counseling

○ I declined counseling

Done

Notice that the written information at the top of the sample screen is actually an area that scrolls on the screen. So the customer can scroll through the written information to read everything. The full text is on the next page for your information.

This is the full acknowledgement language that the customer can review on the signature capture device. We often refer to this as the *Third-Party Acknowledgement*.

Prescription Counseling and/or Insurance Claim Acknowledgement

By my signature directly below as the patient or the authorized personal representative of the patient, I certify that this Publix Pharmacy has offered patient counseling on the medication dispensed and that the prescription identified below was received. I understand that I have a duty to update my health information and that my health care provider who prescribed my medicine is solely responsible for the management of my drug therapy.

Prescription Drug Coverage and Patient Authorization: By my signature below I certify that the information contained on my prescription benefits card or reported to the Publix Pharmacy is correct and that the person for whom the prescription was written is eligible for the benefits claimed. I authorize the release of all information regarding the prescription and claim to which it corresponds to Publix Super Markets and as Publix deems necessary to receive payment, and for treatment and health care operations.

For Customers with Workers' Compensation Coverage: Your signature certifies that this medication is for the treatment of an on-the-job injury.

Scroll Bar

Workflow Safety Tips

- Below is a summary of safety tips for Release to Patient
  - always verify patient's address with open ended question
  - always ask how many prescriptions patient is expecting
  - verify patient name and address is on the bag tag and patient name is on the medication vials & PRE
  - ensure pharmacist verifies product that is reconstituted or pulled from the refrigerator at RTP
  - counseling is required for all new therapy prescriptions and changes in therapy

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name Patient Profiles

Course Description a detail dive into the patient profile

<u>Overview</u>
Key concepts:

- one profile for each patient, shared by the whole company – centralized pharmacy system
- information in profile used to trigger system edits, third-party edits, and clinical edits
- integrity and accuracy of each profile is imperative for patient safety and proper billing
- each pharmacist is responsible for accuracy and integrity of data in the system!

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Detail Dive into the Patient Profile

Below are screen shots with key components of each tab within the patient profile.

Tab 1: Info

Notification identifying whether or not patient has allergies. Allergies listed on Tab 2., if any.

Drop-down box for easy open caps. For safety reasons, this is changed to "yes" only upon request.

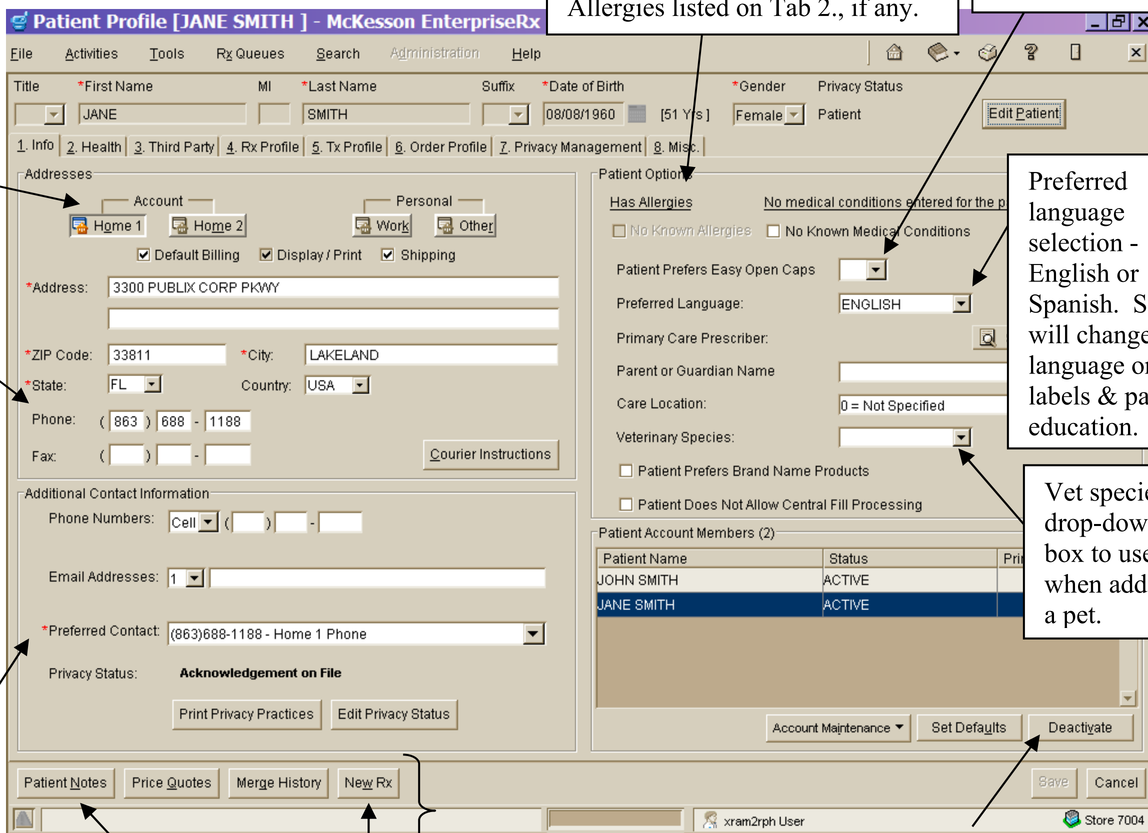
Patient Address – notice the ability to add more than 1 address.

Patient's primary phone #. When a patient calls in refills on the IVR, the patient enters the last 4-digits of this phone #.

Preferred language selection - English or Spanish. Setting will change language on labels & patient education.

Vet species drop-down box to use when adding a pet.

Patient's preferred method of contact. (see note below)



These 4 button options are available on every tab of the Patient Profile.

Add important patient notes to be referenced on all Rxs filled.

A new Rx can be started from the Patient Profile.

Deactivate button to use for a deceased patient (after the date of death has been entered on Tab 8)

Patient contact info

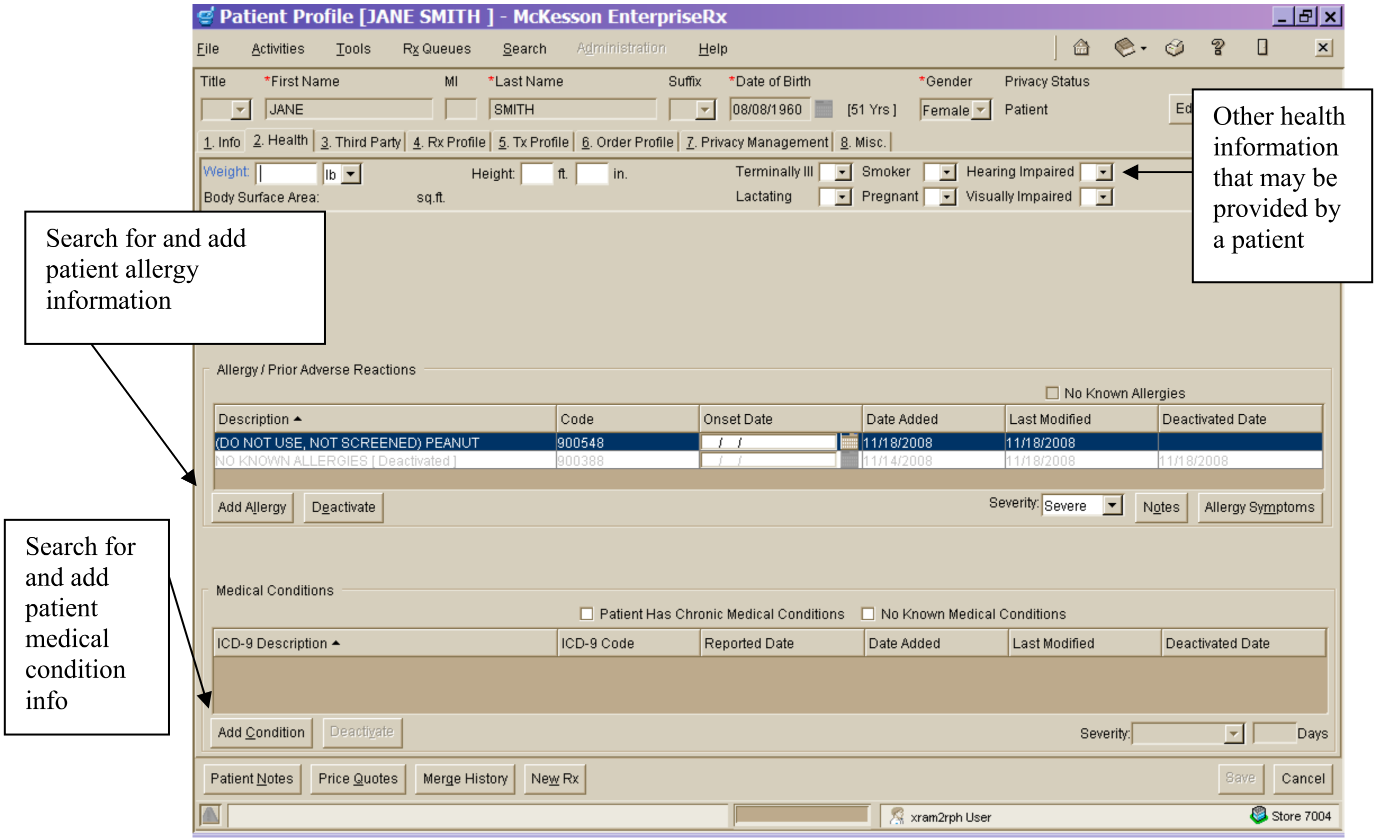
- When a patient calls in a refill on the IVR system, the phone number they enter must match the number in the primary *Phone* field.

Format rules

- Data consistency is part of keeping the integrity and accuracy of the patient profiles and reducing potential of introducing a duplicate patient profile to the system
- We use postal code rules – located on the Pharmacy page @ *Pharmacy Operations > Quick References > Patient and Prescriber Profiles* **>** *Profile Name & Address Standards*.

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Tab 2: Health



Searching for and Adding Allergies

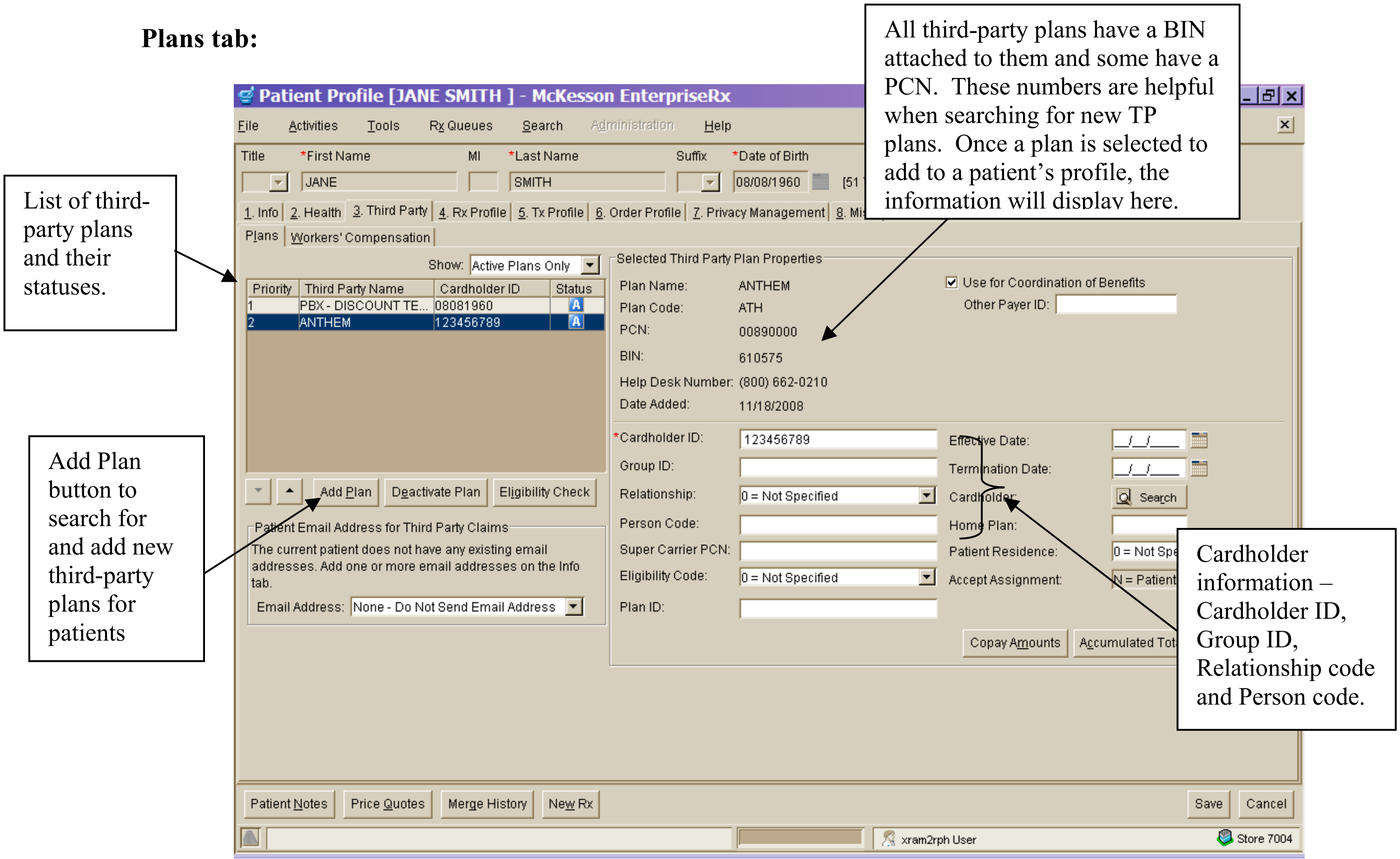
- Refer to procedures on Flip-card on each monitor
  - adding an inactive ingredient allergy correctly is extremely important – you must perform the steps correctly to initiate a DUR
  - Review steps for adding that a patient's allergy info is not known.
- **Pharmacists must verify the allergy information Technicians/Interns enter to ensure it has been entered correctly**.

Searching for and Adding Medical Conditions

- Search by:
  - name of the condition
  - Diagnosis code for the condition or
  - Name of the drug they are taking for the condition.
- **The Pharmacist must verify medical condition information Technicians/Interns enter to ensure it has been entered correctly.**

<u>Tab 3: Third Party</u>
There are 2 tabs within the Third Party tab, Plans and Workers' Compensation.

Plans tab:

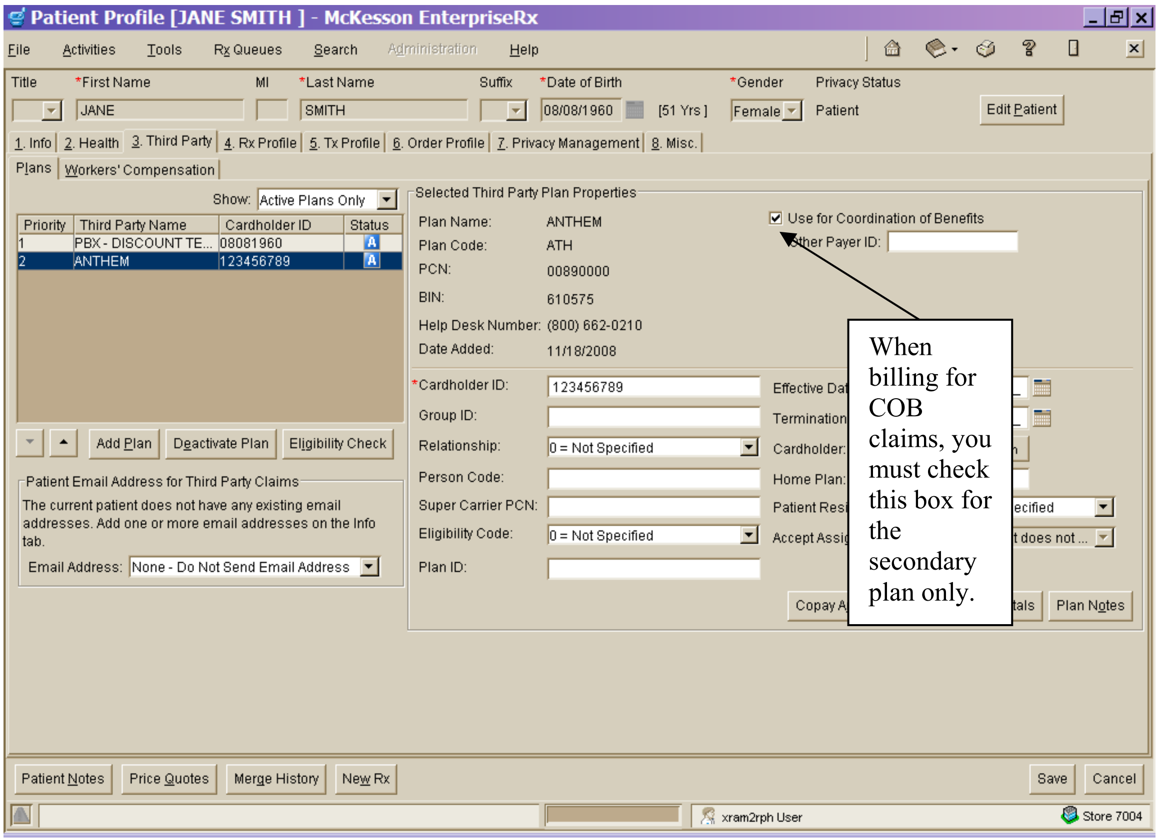


Adding third-party information to a patient's profile

- Review the steps for setting up a third party plan in a patient's profile.
- Ensure to use the Eligibility Check tool (covered in Module 9)
- It's best to search by BIN & PCN if available

Billing more than one third party/coupon

- When split billing or using Coordination of Benefits (COB) billing, you need to check the Use for COB check box on the secondary insurance.

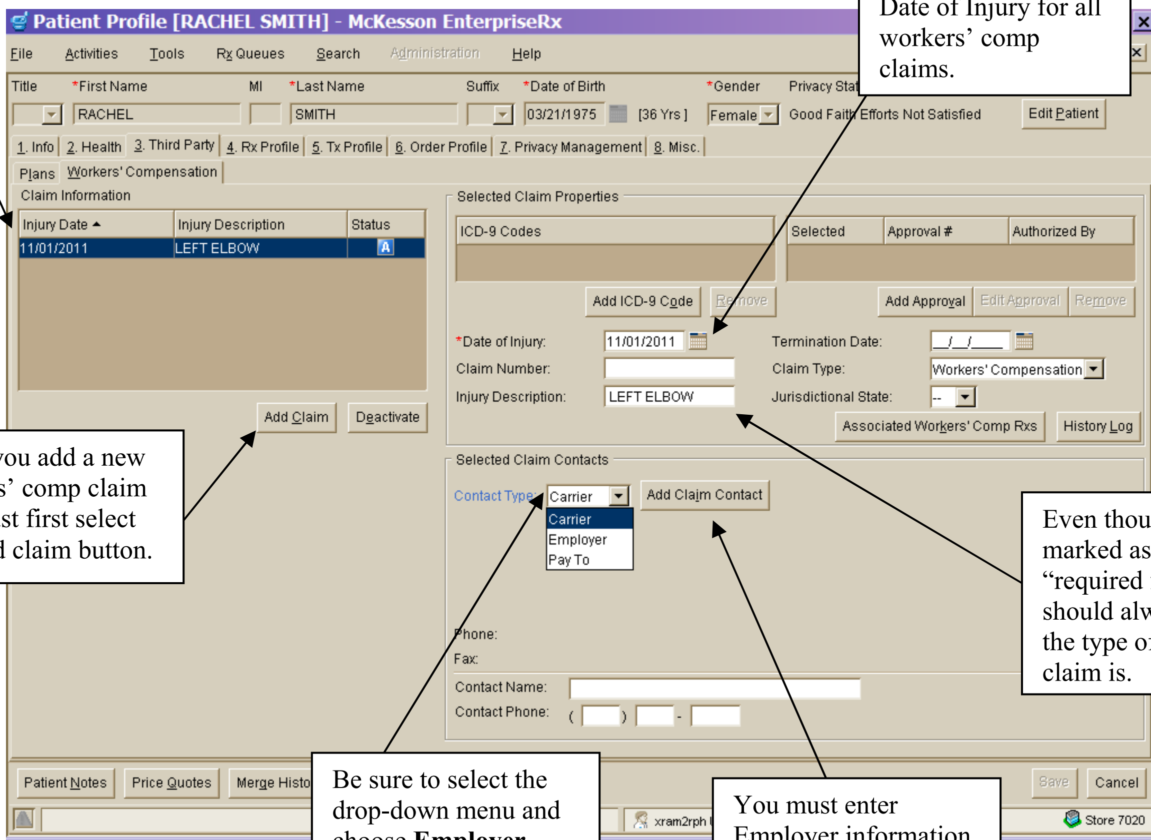


- Refer to the Flip-card on the monitors for COB tips

Workers' Compensation tab:

You must enter a Date of Injury for all workers' comp claims.

Each workers' comp claim will be listed here.



When you add a new workers' comp claim you must first select the Add claim button.

Even though it's not marked as a "required field", you should always enter the type of injury the claim is.

Be sure to select the drop-down menu and choose **Employer** when entering employer information.

You must enter Employer information for all workers' comp claims.

General steps to process a worker's compensation claim

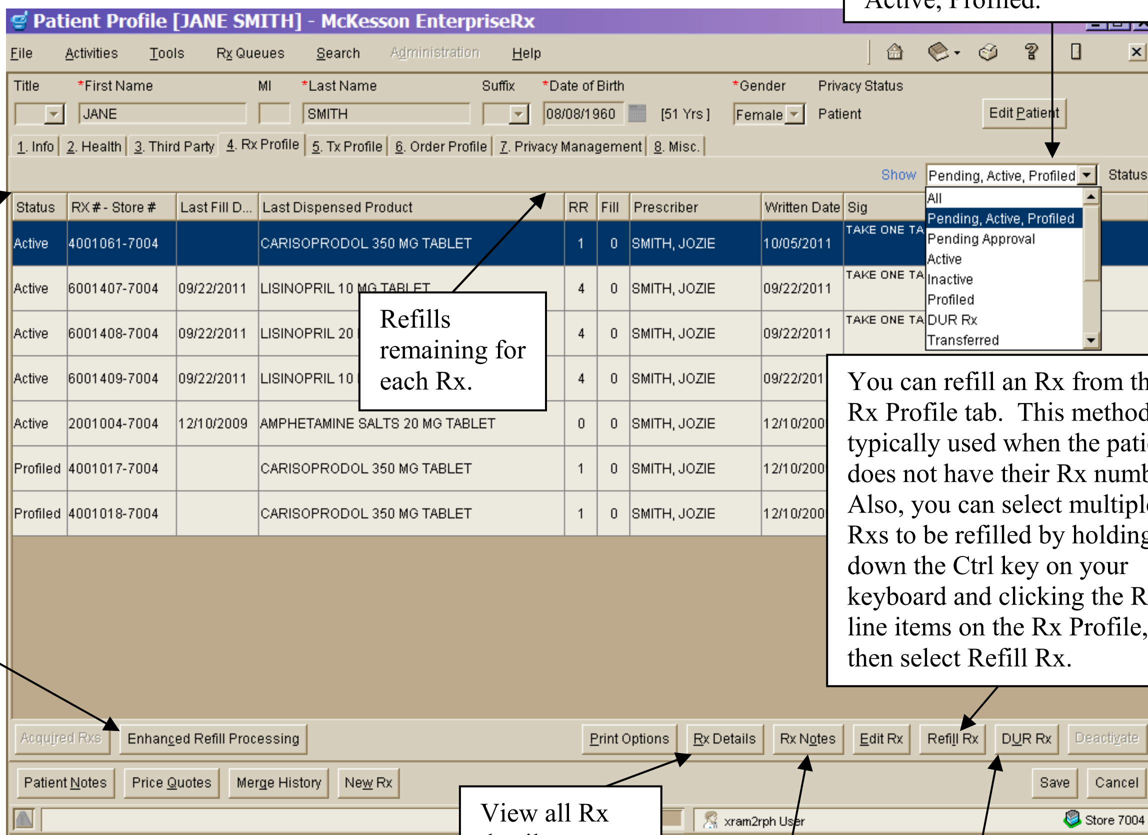
- Setting up and processing can be done from workflow:
  1. In Reception,
     a. Add Worker's Comp insurance to patient profile
     b. Add claim and injury information to patient profile
  2. In Data Entry
     a. Complete data entry
     b. Associate the claim to the injury (the system will automatically take you to the screen to do this, but you can also access it through the Additional Information screen)

**Pharmacist I/New Hire Graduate Intern Training
Required Courses**

Tab 4: Rx Profile

The Rx Profile screen can be filtered by status of the Rx. The system defaults the filter to Pending, Active, Profiled.

Double click on any of the column headings to filter the items listed.



Refills remaining for each Rx.

You can refill an Rx from the Rx Profile tab. This method is typically used when the patient does not have their Rx number. Also, you can select multiple Rxs to be refilled by holding down the Ctrl key on your keyboard and clicking the Rx line items on the Rx Profile, then select Refill Rx.

Set up Rxs for Enhanced Refill Processing (ERP) to be auto-filled each month.

View all Rx details including the scanned in Hard Copy image

View or add notes pertaining to a specific Rx

Add a DUR Rx from the Rx Profile - allows you to add a patient's medication that was filled by another pharmacy or OTC med so that it can go through the DUR process

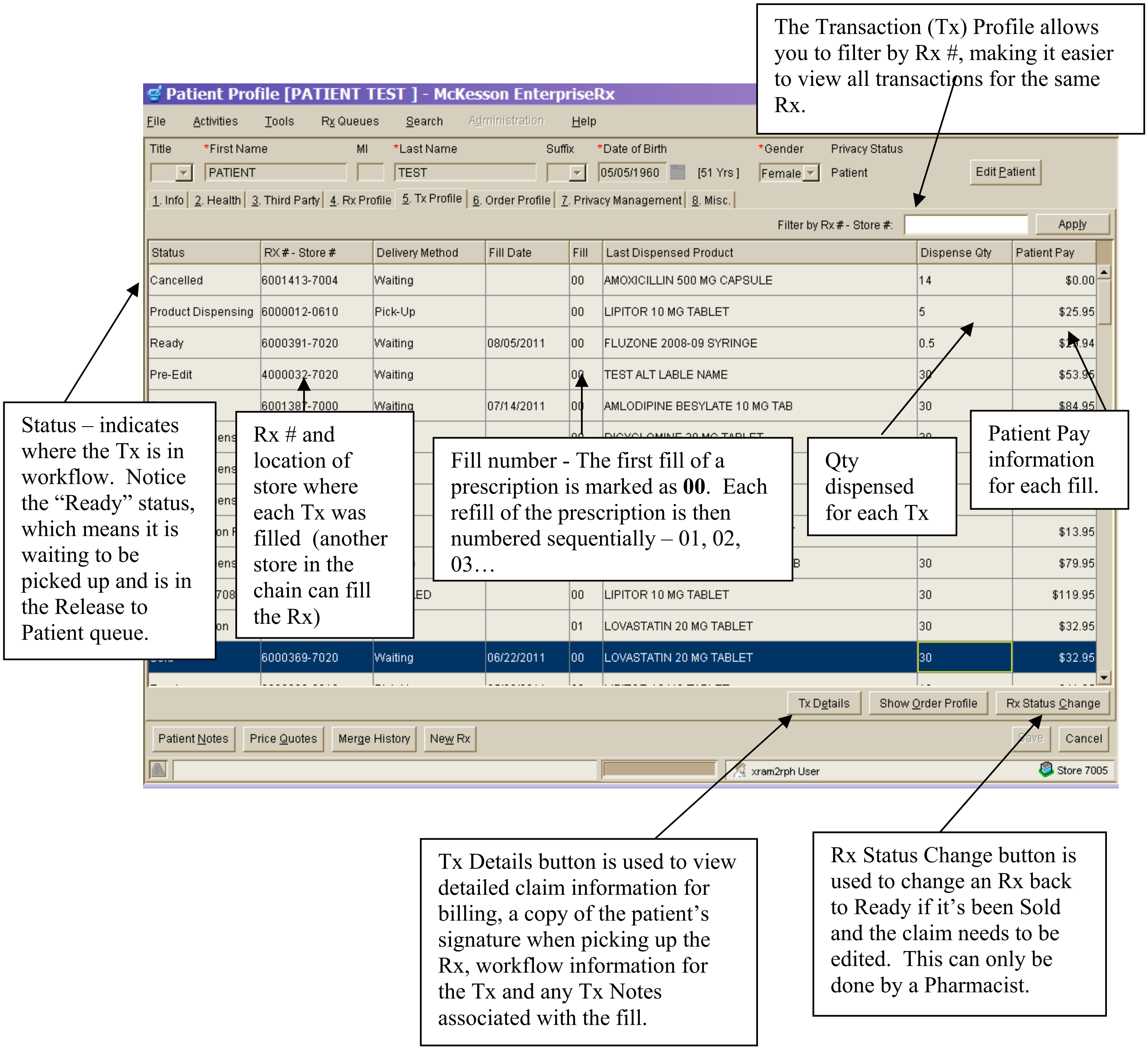
Key points

- The Rx Profile tab defaults to showing Pending, Active and Profiled.
- Use the filter functionality to narrow to what you want to see.
- Sort columns by clicking on the column titles.

Rx Status Types
Review the different Rx statuses and their descriptions.

Status	Description
Pending Approval	Prescriptions waiting for approval in Contact Manager.
Active	Prescriptions available to be filled. Note: Prescriptions that are expired still show up with a status of Active.
Inactive	Prescriptions that have been deactivated.
Profiled	Prescriptions that have never been filled, but are active and available to fill.
DUR Rx	Record of a prescription filled by another pharmacy (not a Publix pharmacy) or OTC medication.
Transferred	Prescriptions transferred between Publix pharmacies or to pharmacies outside of Publix.
Inactive Profiled	Prescriptions that have never been filled and were deactivated.
Inactive DUR RX	A DUR Rx record that was deactivated because the patient no longer uses the medication.
Cancelled	Prescriptions entered into the system and then cancelled before the first fill was completed.
Denied	New prescription request sent to a prescriber and was denied of being filled.
Divested	We do not use this status.

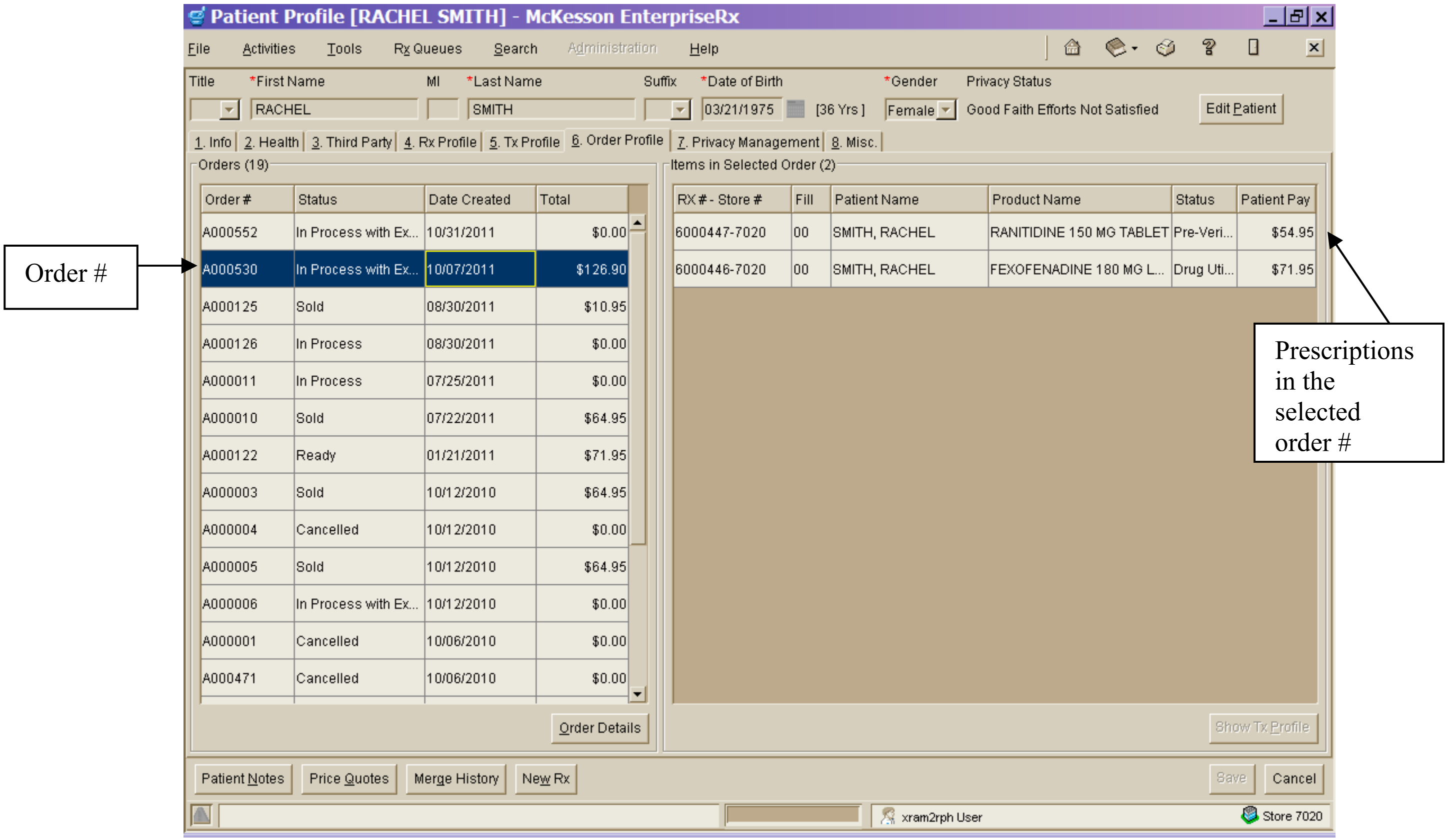
Tab 5: Tx Profile



Key points

- Get from a particular Rx on the Rx Profile tab to the transactions (Txs) for that Rx
    - within a few clicks by clicking on Rx Details and then Tx Details, or
    - by going directly to the Tx Tab and entering the Rx# in the filter field
- Sort columns by clicking on the column titles.

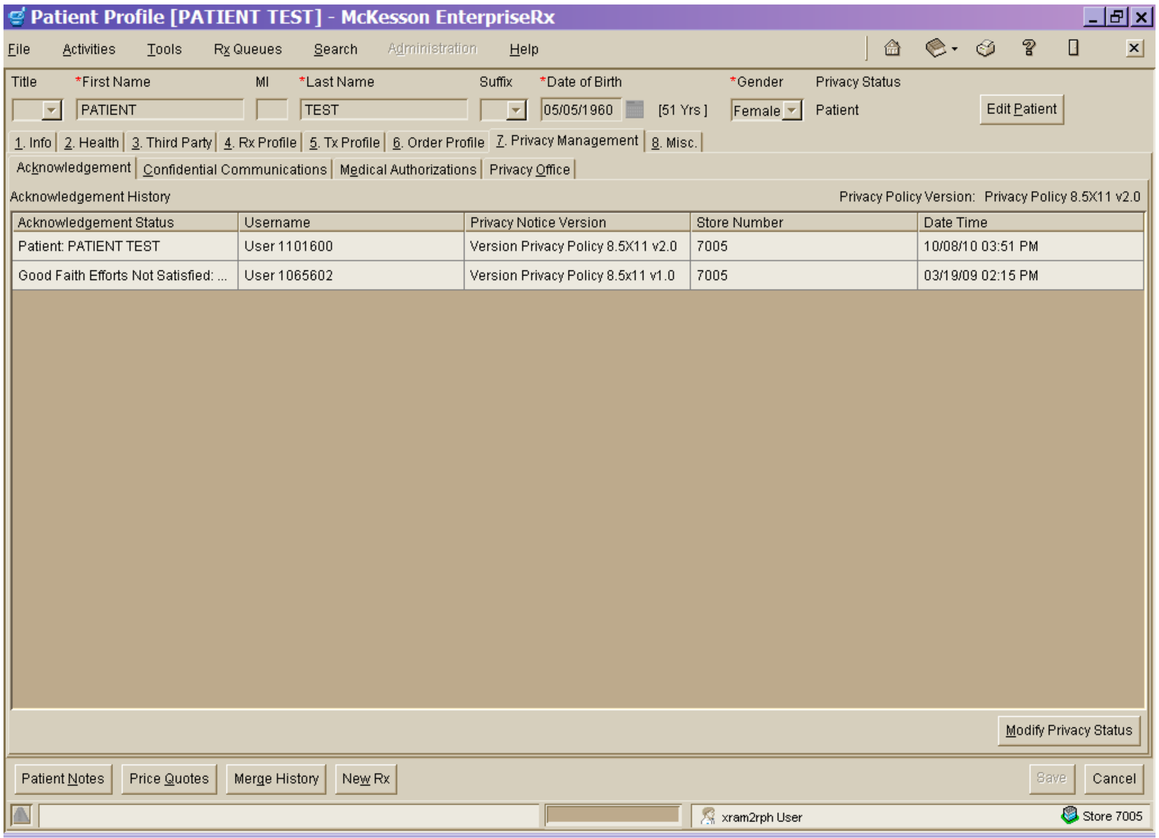
Tab 6: Order Profile



Key points

- Explain how the screen provides information on which prescriptions are in each order. The left side of the screen shows all orders within the selected patient's profile. The right side of the screen shows all prescriptions in the selected order

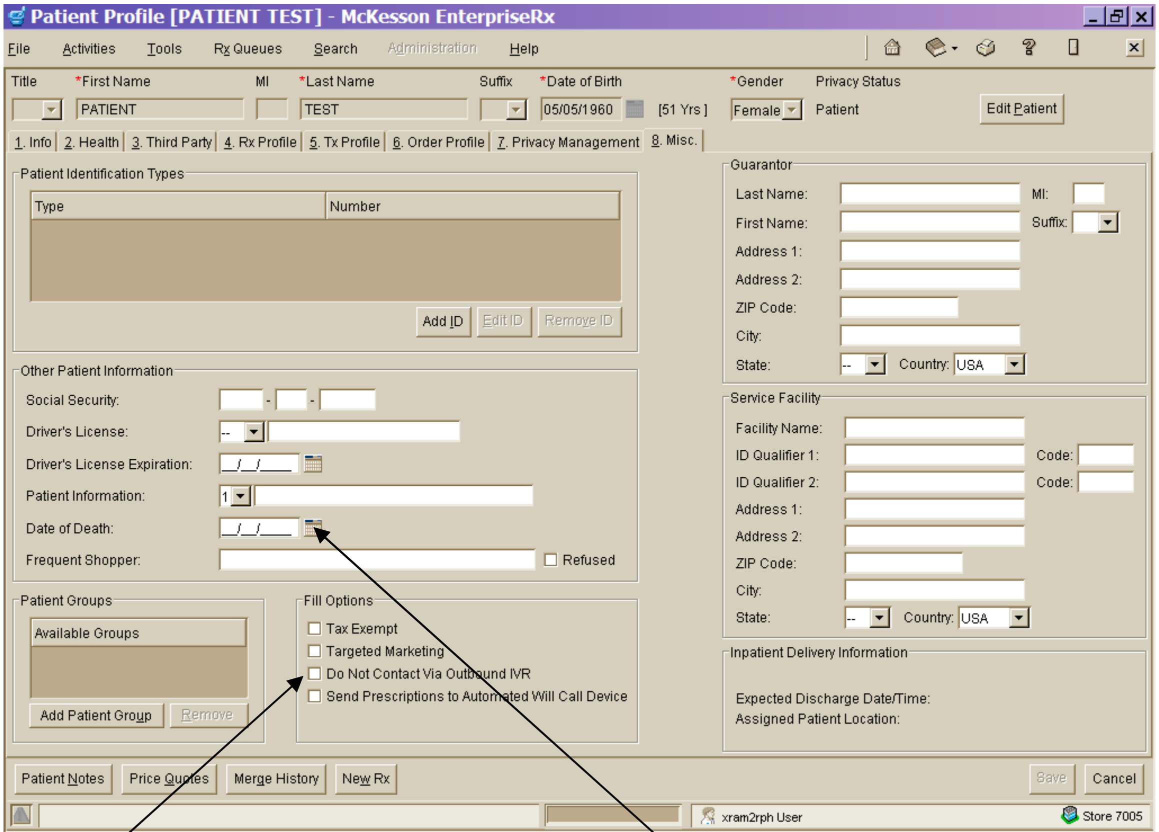
Tab 7: Privacy Management



Review each of the Privacy Management tabs below.

Tab	Contents
Acknowledgement	Contains the history of the patient's acknowledgement of our Privacy policy.
Confidential Communications	Where you mark the profile if: • the patient doesn't want their prescriptions filled anywhere but their home store • the patient does not want to be contacted by phone or address, and • where patient's can limit who can pick up their Rxs
Medical Authorizations	Where you can add and scan in any medical authorizations brought in by the patient.
Privacy Office	Contains the checkbox for an emancipated minor.

Tab 8: Misc.



If a patient asks not to be contacted by an automated call-out system (i.e., Outbound IVR), you check the Do Not Contact Via Outbound IVR box. Outbound calling is typically used to inform patients when prescriptions are ready to pick up.

If a patient is deceased, a family member may give you their date of death to include in our records. Once you have entered the date, be sure to go to the Info tab and deactivate the patient's profile.

Patient Merge

- It is essential that all of our patients' information exists in only one record. Multiple patient records (profiles) create many potential problems including:
  - Increased chance a drug allergy or drug interaction will be missed.
  - Drug history and third-party information may be entered correctly on only one of the records.
  - "Missing prescriptions" due to only one of the records immediately visible to the local pharmacy
  - Multiple (wrong) addresses and phone numbers impairing our ability to send patients letters, do outbound calling, etc.
  - Inbound PPI communications will not identify the correct patient.
  - Refer to the document on the Pharmacy page @ *Pharmacy Operations > Quick References > Patient and Prescriber Profiles > Patient Merge*

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name Prescriber Profile

Course Description a detail dive into the prescriber profile

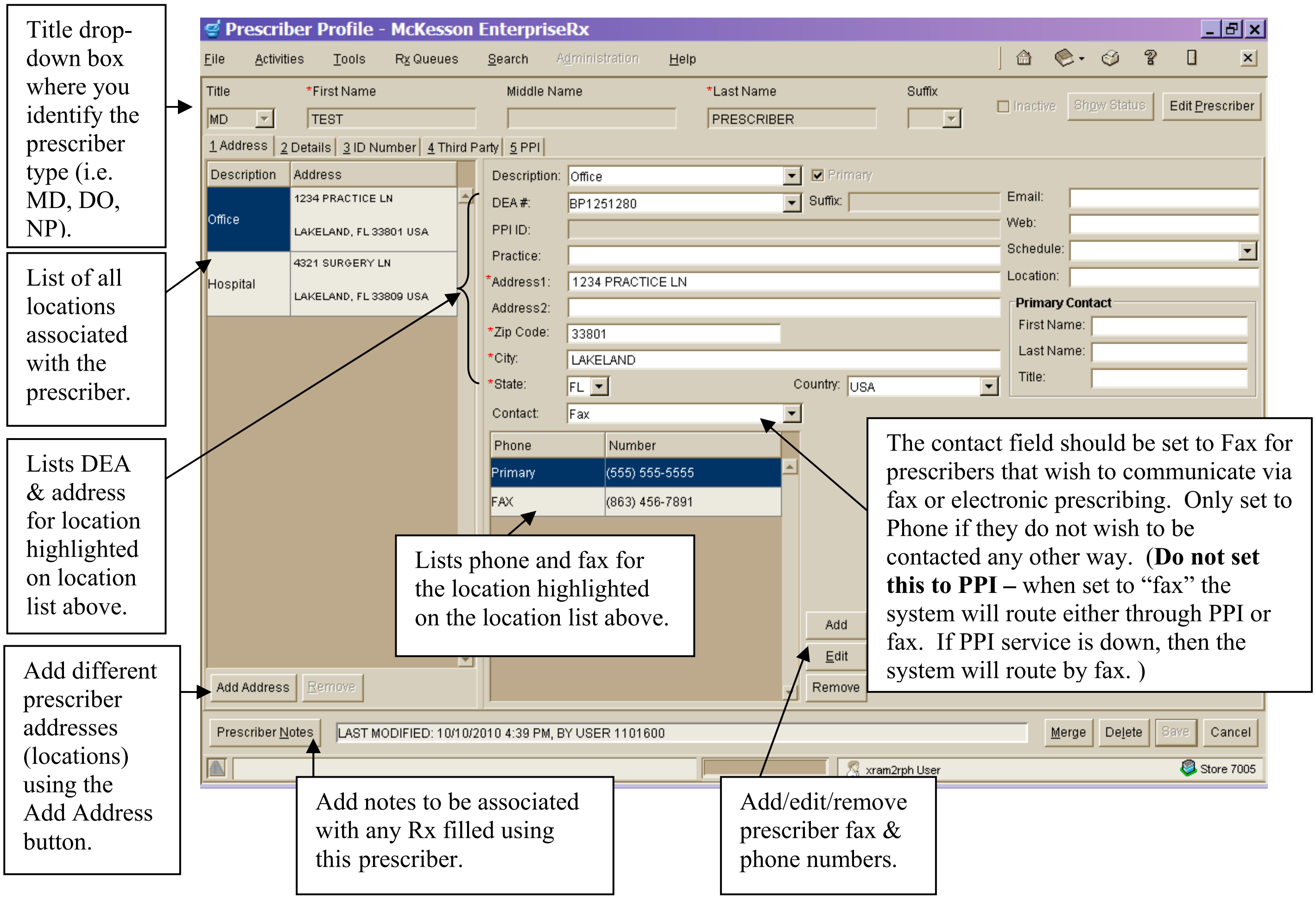
Overview
Key concepts:

- one profile for each prescriber, shared by the whole company – centralized pharmacy system
- information in profile important for billing properly
- information in profile incorporated into controlled substance reporting (as required by state)
- electronic prescribing works based on information set up in the profile
- integrity and accuracy of each profile is imperative for regulatory compliance and proper billing
- each pharmacist is responsible for accuracy and integrity of data in the system!

Detail Dive into the Prescriber Profile

Below are screen shots with key components of each tab within the prescriber profile..

Tab 1: Address



Multiple prescriber addresses

- A prescriber profile should contain address information for each office location for the prescriber.
- The office location selected must match the office location identified on the hard copy prescription.

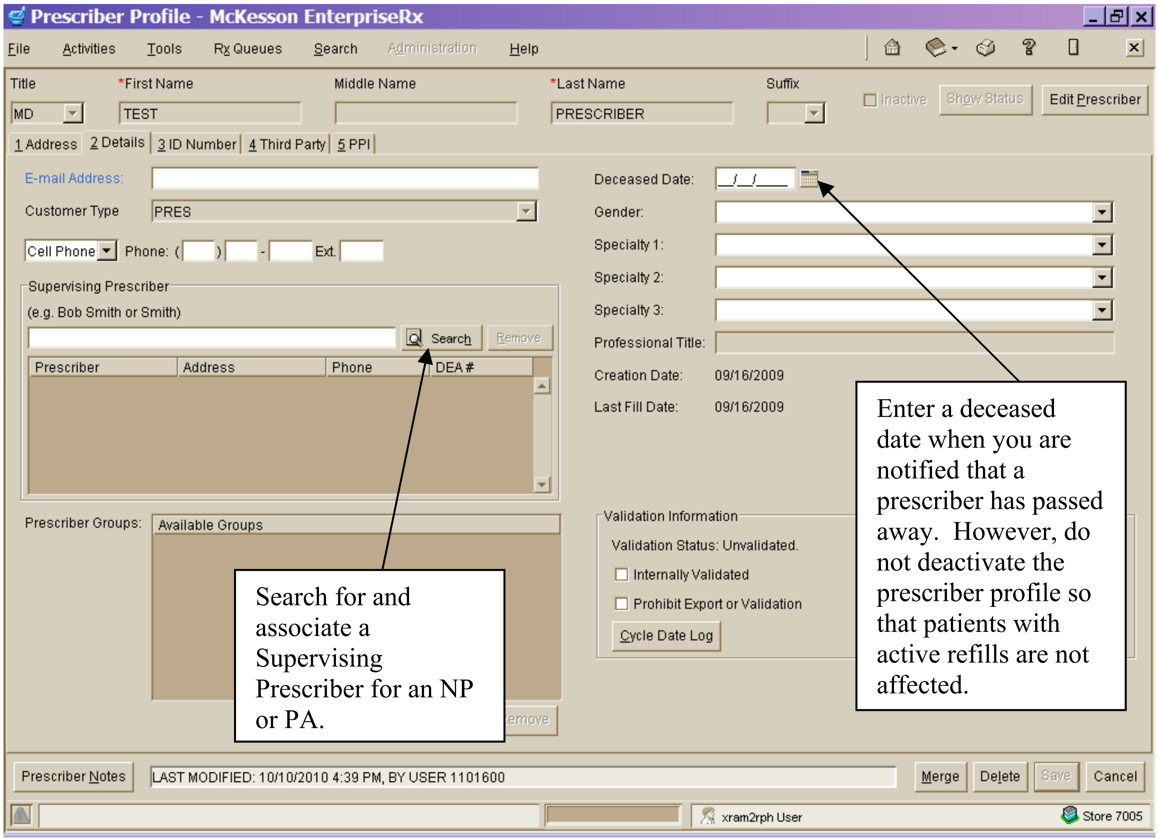
Format rules

- Data consistency is part of keeping the integrity and accuracy of the prescriber profiles and reducing potential of introducing a duplicate prescriber profile to the system
- We use postal code rules – located on the Pharmacy page @ *Pharmacy Operations > Quick References > Patient and Prescriber Profiles > Profile Name & Address Standards*

The Contact field

- This should always be set to Fax! (Even for prescribers that e-prescribe.)

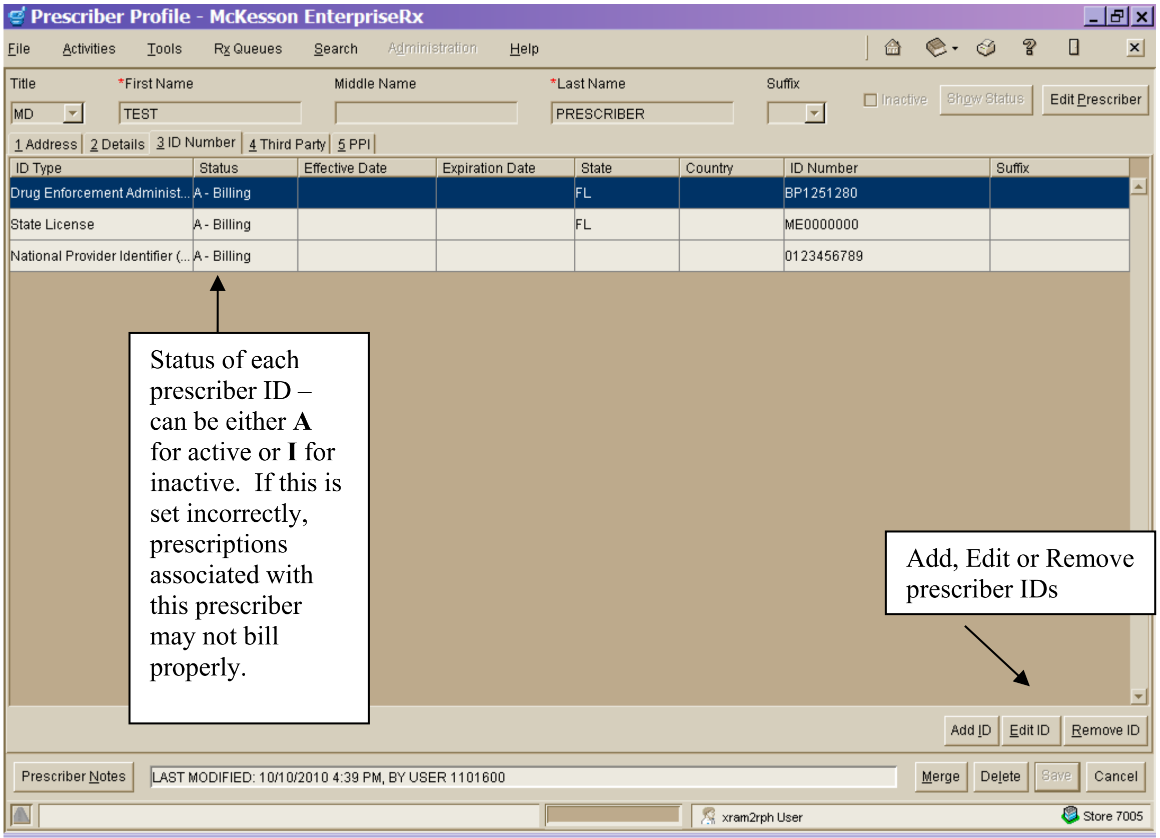
<u>Tab 2: Details</u>



Setting up a NP (Nurse Practitioner) and PA (Physicians Assistant)

1. Set up a separate profile for each NP and PA, and then
2. associate them with a Supervising Prescriber (which must be a doctor with a valid license and DEA# already set up in our system).

Tab 3: ID Number



ID numbers for NPs and PAs

- NPs and PAs do not have DEA#s (they cannot prescribe controlled substances); however, they must have a valid NPI #.

Tab 4: Third-Party – not used by the pharmacy

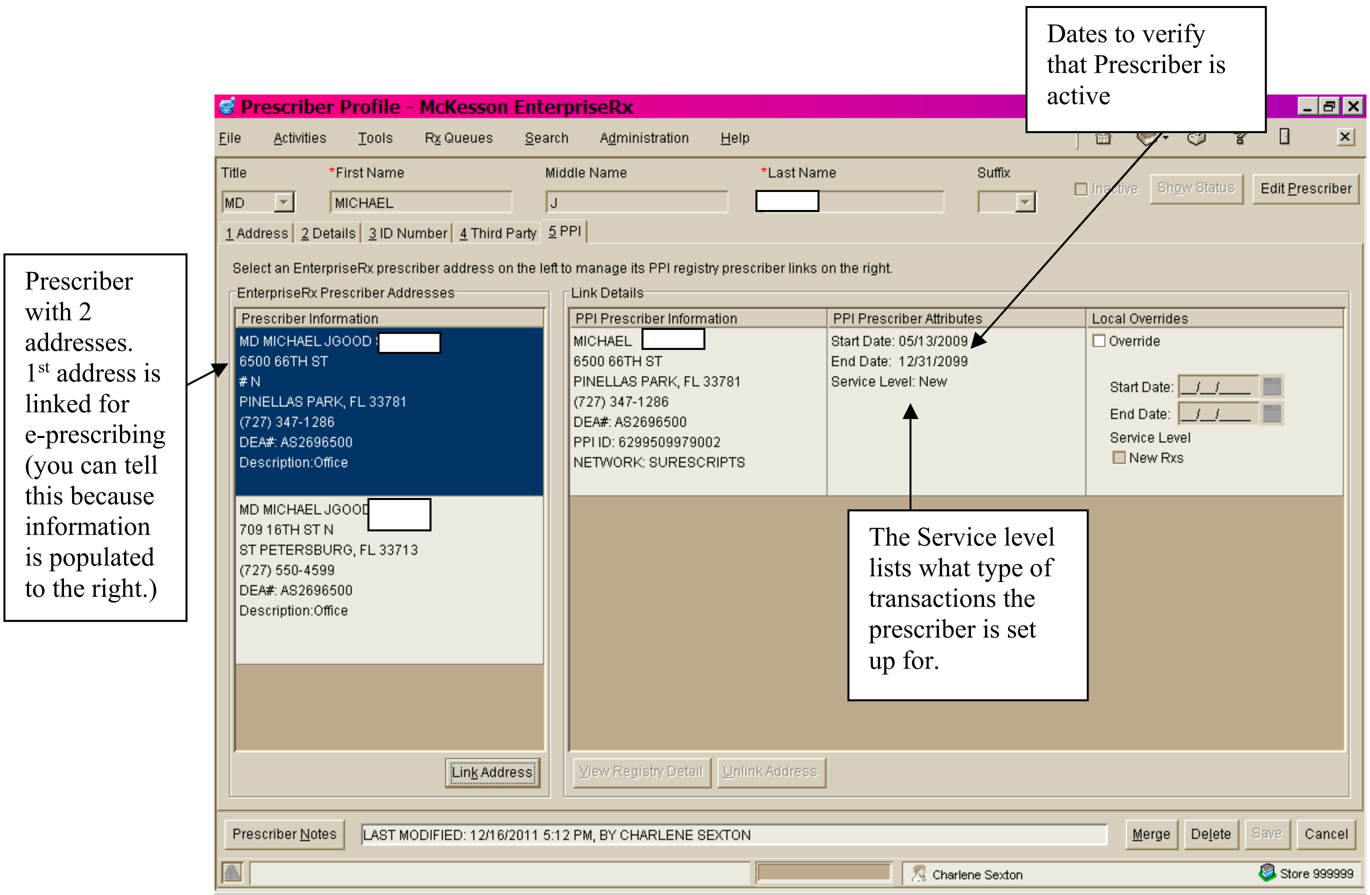
Pharmacist I/New Hire Graduate Intern Training
Required Courses

Tab 5: PPI

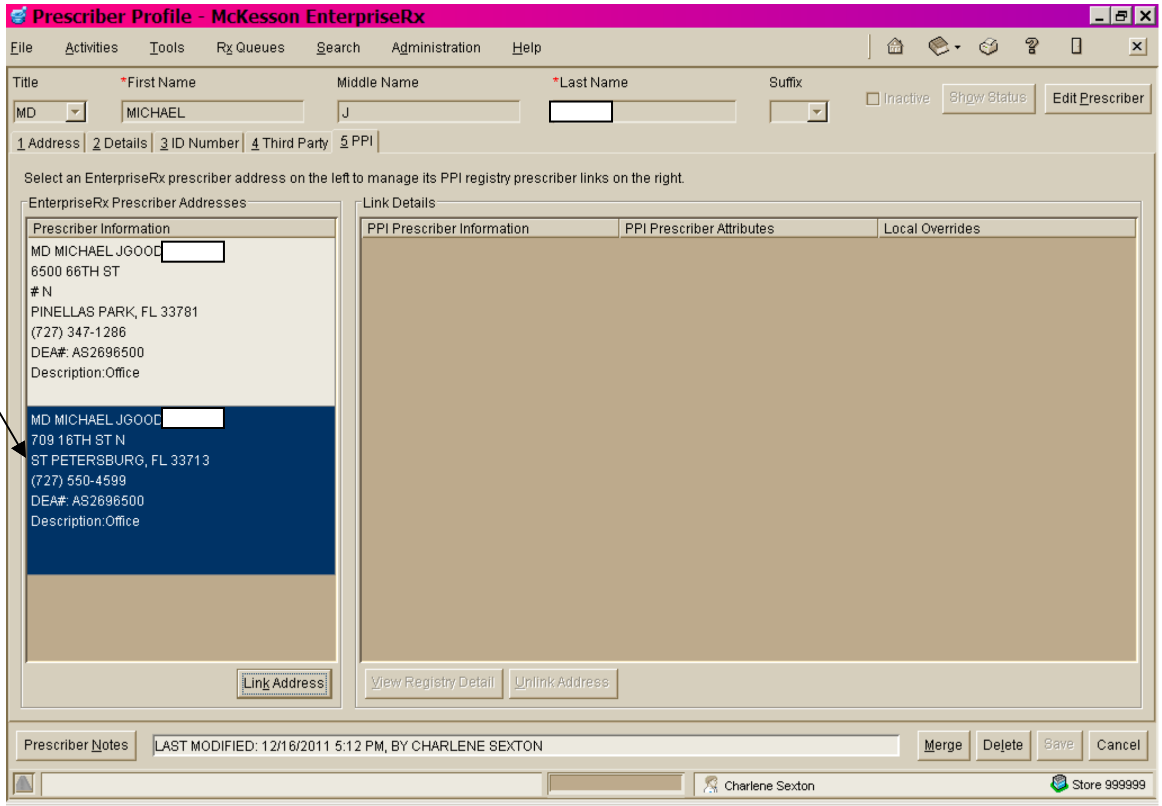
PPI = Electronic prescribing

- Prescribers with electronic prescribing software in their offices can electronically send new prescriptions directly to our pharmacy system.
- We can send refill renewal requests electronically to the prescriber's system.
- The prescribers can then approve or deny the refill renewal request and send that directly to our pharmacy system.

For electronic prescribing to work properly, we have to set up certain fields in the prescriber profile correctly.



2nd address is not linked to e-prescribing (you can tell this because information is not populated to the right.) In this scenario you would call the Pharmacy Support Desk so they could link the prescriber.



Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name Drug Profiles

Course Description a detail dive into the product and inventory profiles

<u>Overview</u>
Key concepts:

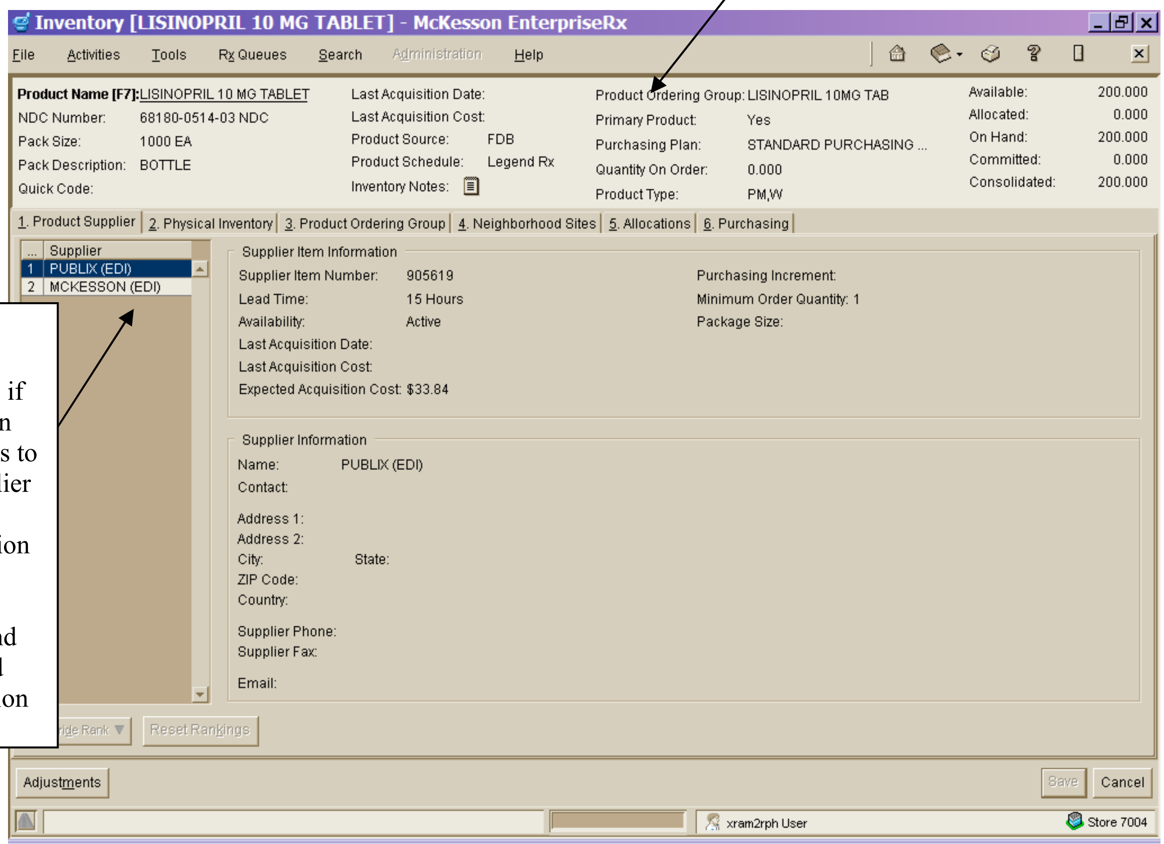
- One Product Profile for each drug (by NDC) is shared by the whole company and maintained by Pharmacy Operations. The Product Profile contains:
  - specifics on the drug (form, SIG language, pack size, etc.)
  - pill image
  - link to the Inventory Profile
- Each pharmacy has an Inventory Profile for any products that have been ordered at that location. The Inventory Profile contains:
  - supplier information
  - acquisition cost
  - a field to add a drug to a special group (e.g., fast movers)
  - a screen to view products linked by GCN (Product Ordering Group or POG)
  - a view into inventory levels at neighborhood locations
  - identification of where inventory is allocated among the various inventory statuses (e.g., available, on-hand)
  - fields to manage order parameters – Override Min/Max values
  - a field to make inventory adjustments and select a reason for each adjustment

Detail Dive into the Inventory Profile

Below are screen shots with key components of each tab within the inventory profile..

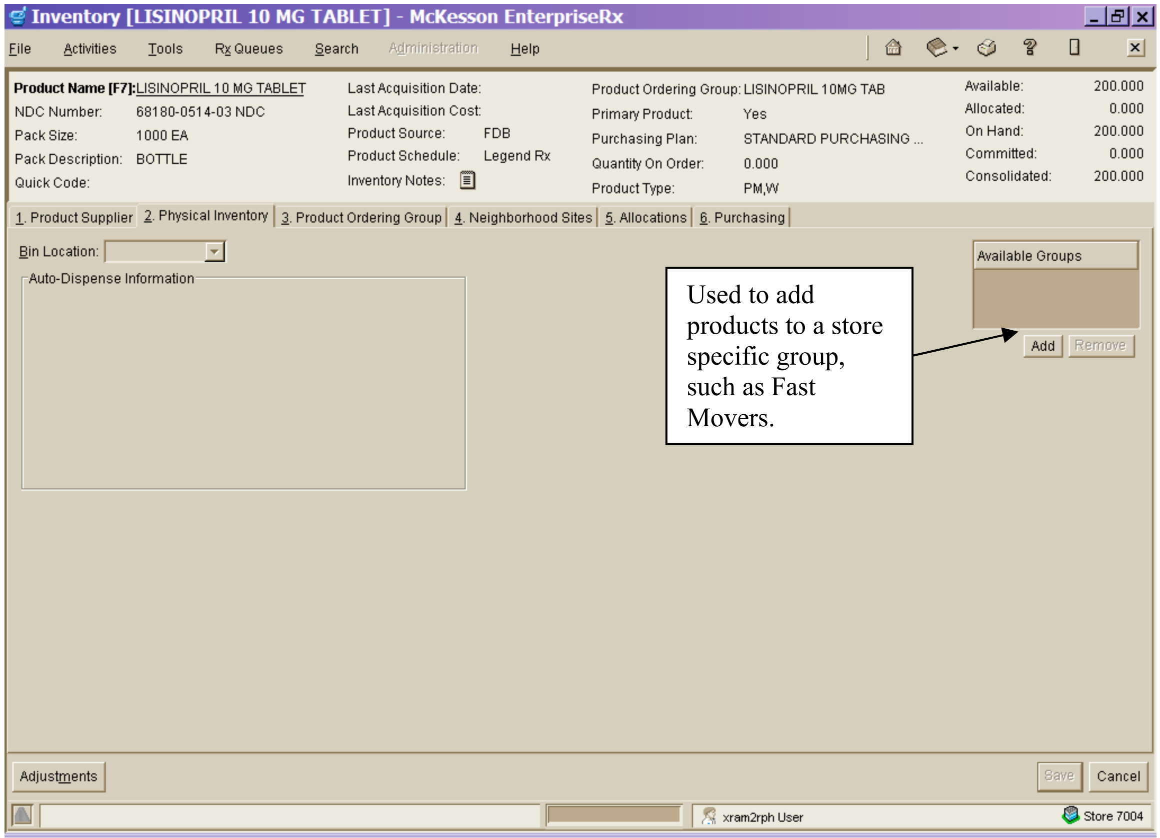
Tab 1: Product Supplier

All of the product information on the top of the screen is static and viewable from each Inventory tab.



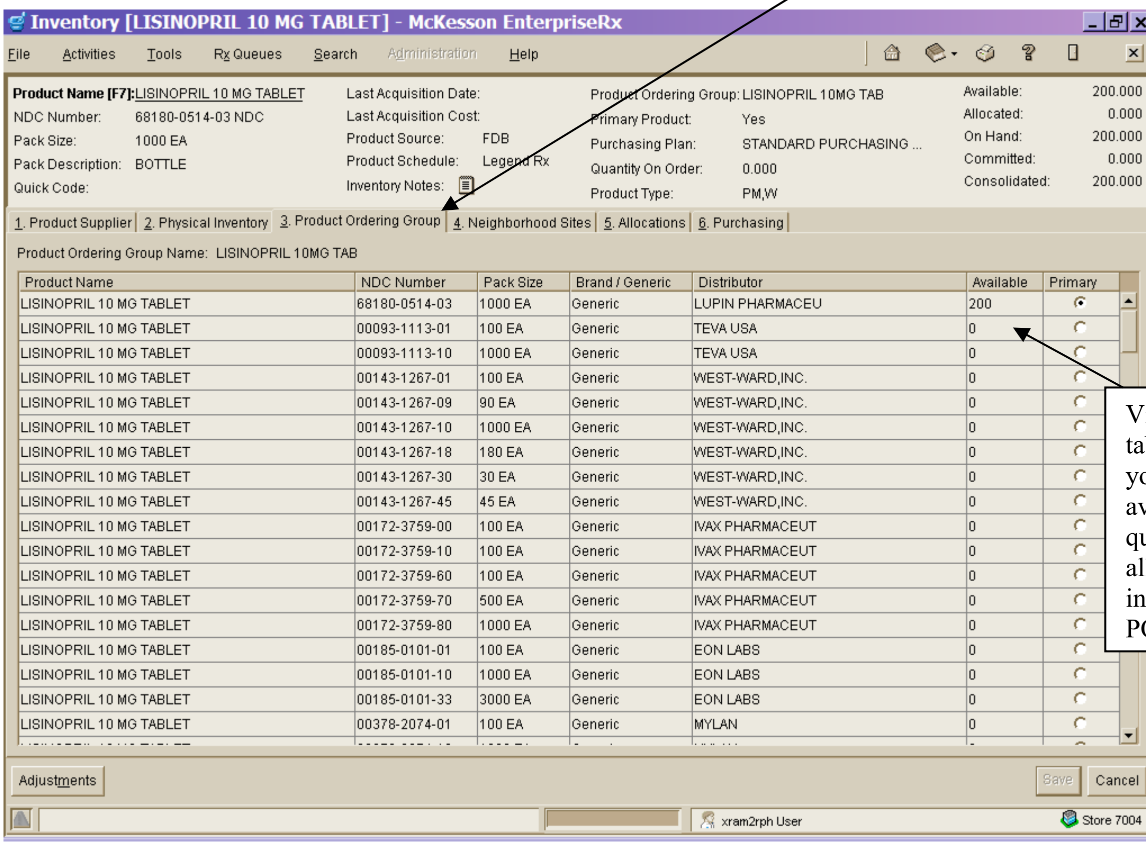
Toggle between suppliers if more than one exists to see supplier specific information such as supplier item # and Expected Acquisition Cost.

Tab 2: Physical Inventory



Tab 3: Product Ordering Group

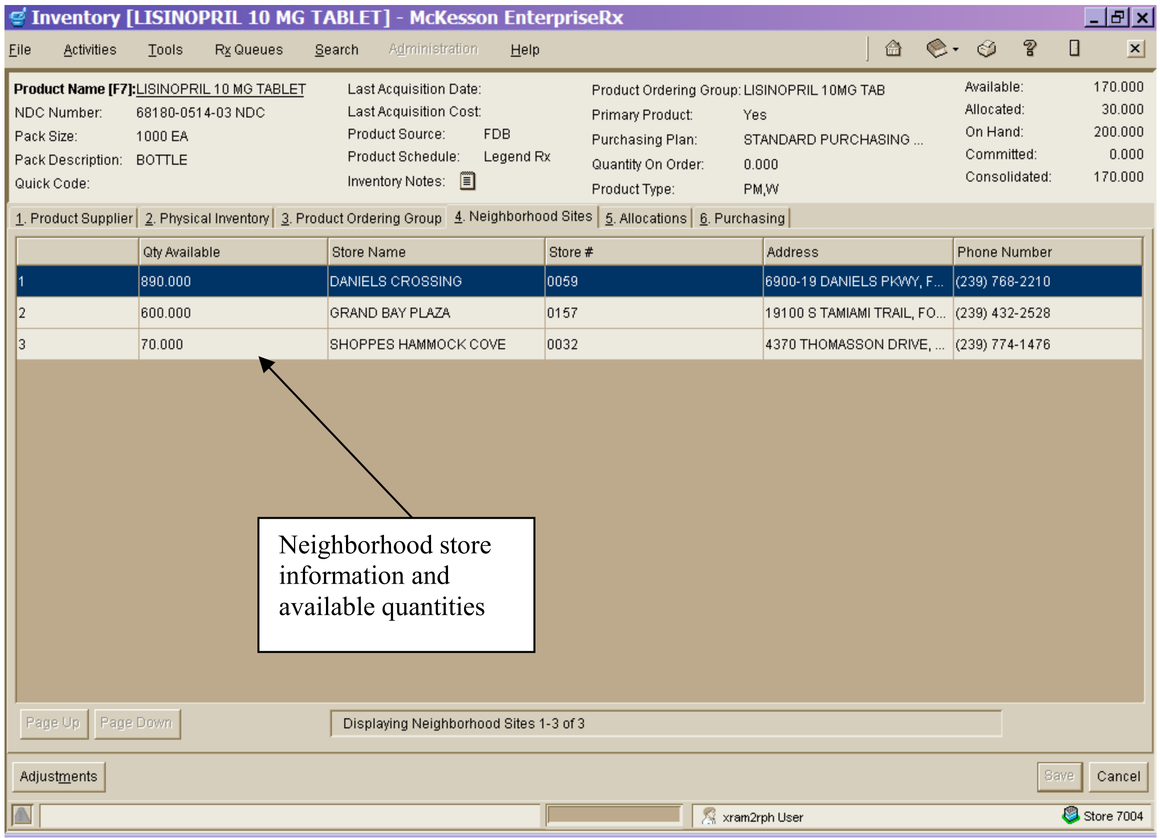
This tab lists all products that are in the same Product Ordering Group (POG). A POG is a list of products all having the same GCN, grouped together with a primary product for ordering purposes. The primary product will always be at the top of the list. Only the primary product will be ordered, no matter what product is selected in workflow.



Product Name	NDC Number	Pack Size	Brand / Generic	Distributor	Available	Primary
LISINOPRIL 10 MG TABLET	68180-0514-03	1000 EA	Generic	LUPIN PHARMACEU	200	◉
LISINOPRIL 10 MG TABLET	00093-1113-01	100 EA	Generic	TEVA USA	0	○
LISINOPRIL 10 MG TABLET	00093-1113-10	1000 EA	Generic	TEVA USA	0	○
LISINOPRIL 10 MG TABLET	00143-1267-01	100 EA	Generic	WEST-WARD,INC.	0	○
LISINOPRIL 10 MG TABLET	00143-1267-09	90 EA	Generic	WEST-WARD,INC.	0	○
LISINOPRIL 10 MG TABLET	00143-1267-10	1000 EA	Generic	WEST-WARD,INC.	0	○
LISINOPRIL 10 MG TABLET	00143-1267-18	180 EA	Generic	WEST-WARD,INC.	0	○
LISINOPRIL 10 MG TABLET	00143-1267-30	30 EA	Generic	WEST-WARD,INC.	0	○
LISINOPRIL 10 MG TABLET	00143-1267-45	45 EA	Generic	WEST-WARD,INC.	0	○
LISINOPRIL 10 MG TABLET	00172-3759-00	100 EA	Generic	IVAX PHARMACEUT	0	○
LISINOPRIL 10 MG TABLET	00172-3759-10	100 EA	Generic	IVAX PHARMACEUT	0	○
LISINOPRIL 10 MG TABLET	00172-3759-60	100 EA	Generic	IVAX PHARMACEUT	0	○
LISINOPRIL 10 MG TABLET	00172-3759-70	500 EA	Generic	IVAX PHARMACEUT	0	○
LISINOPRIL 10 MG TABLET	00172-3759-80	1000 EA	Generic	IVAX PHARMACEUT	0	○
LISINOPRIL 10 MG TABLET	00185-0101-01	100 EA	Generic	EON LABS	0	○
LISINOPRIL 10 MG TABLET	00185-0101-10	1000 EA	Generic	EON LABS	0	○
LISINOPRIL 10 MG TABLET	00185-0101-33	3000 EA	Generic	EON LABS	0	○
LISINOPRIL 10 MG TABLET	00378-2074-01	100 EA	Generic	MYLAN	0	○

Viewing this tab allows you to see available quantities for all products in the same POG.

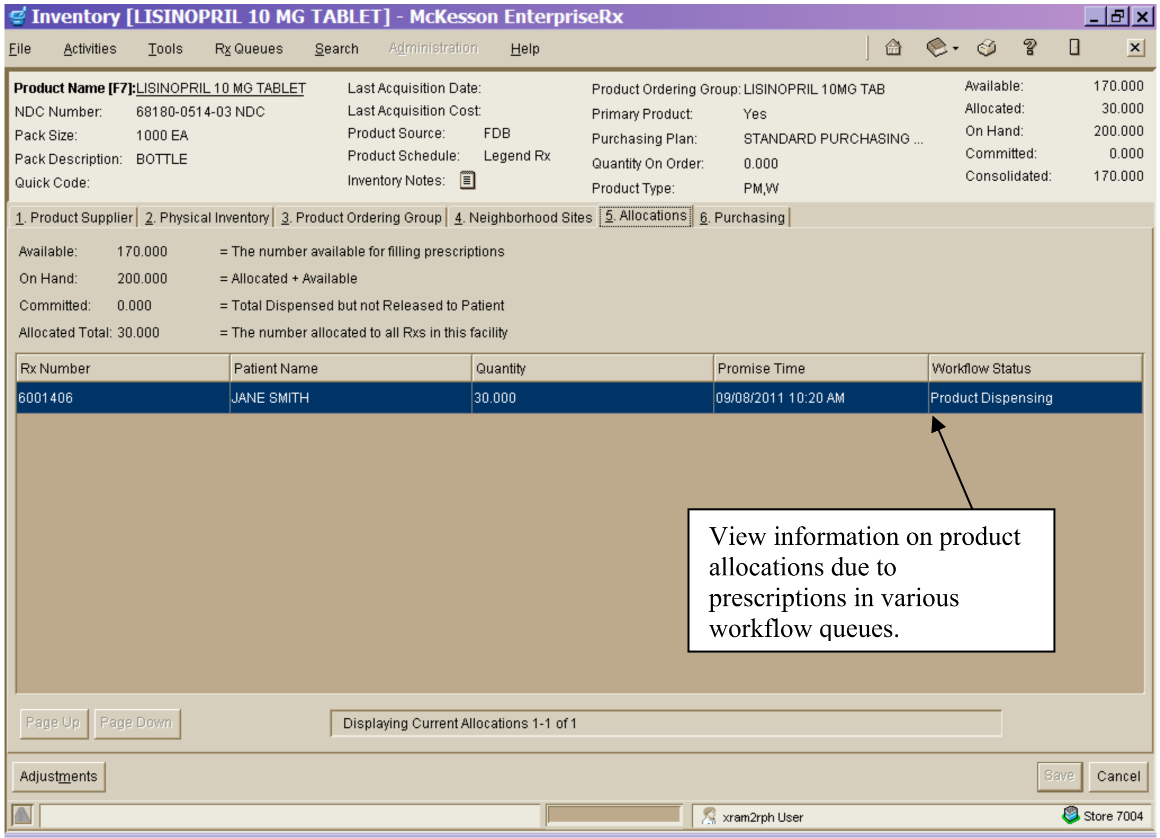
Tab 4: Neighborhood Sites



About neighborhood sites

- Neighborhood sites are other pharmacy locations that are geographically close.
- A neighborhood location is considered close enough that you would ask or expect a customer to drive there to pick up a prescription.
- If low/out of stock, locate drugs in stock at neighboring pharmacy.

Tab 5: Allocations



Understanding inventory statuses

The following table will help you understand inventory statuses as identified on the Inventory screen, as well as throughout workflow:

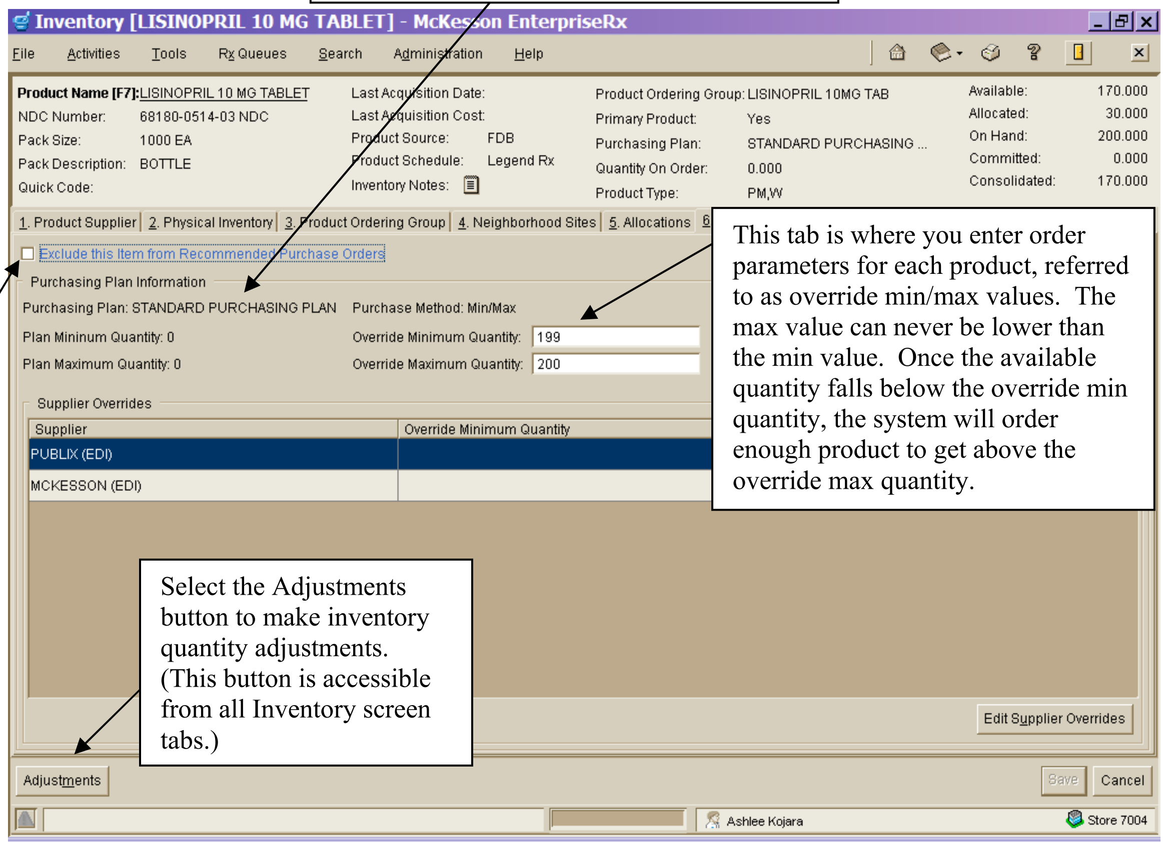
	Workflow Queue			
Inventory Status	**Before Data Entry**	**Data Entry Completed**	**Product Dispensing Completed**	**Sold**
Available	30	**0**	0	0
Allocated	0	**30**	**0**	0
Committed	0	0	**30**	**0**
On-hand	30	**30**	**0**	0

Note: There's also a ***Consolidated*** inventory status which is the combined *On Hand* inventory for all products in a specific Product Ordering Group (POG). The product will not reorder until the consolidated quantity falls below the Min value (discussed on next page).

Tab 6: Purchasing

All products are attached to a Standard Purchasing Plan with a defaulted min/max of 0/0.

The Exclude this item from Recommended Purchase Orders checkbox can be selected, and is sometimes pre-selected by Corporate to keep items from ordering.

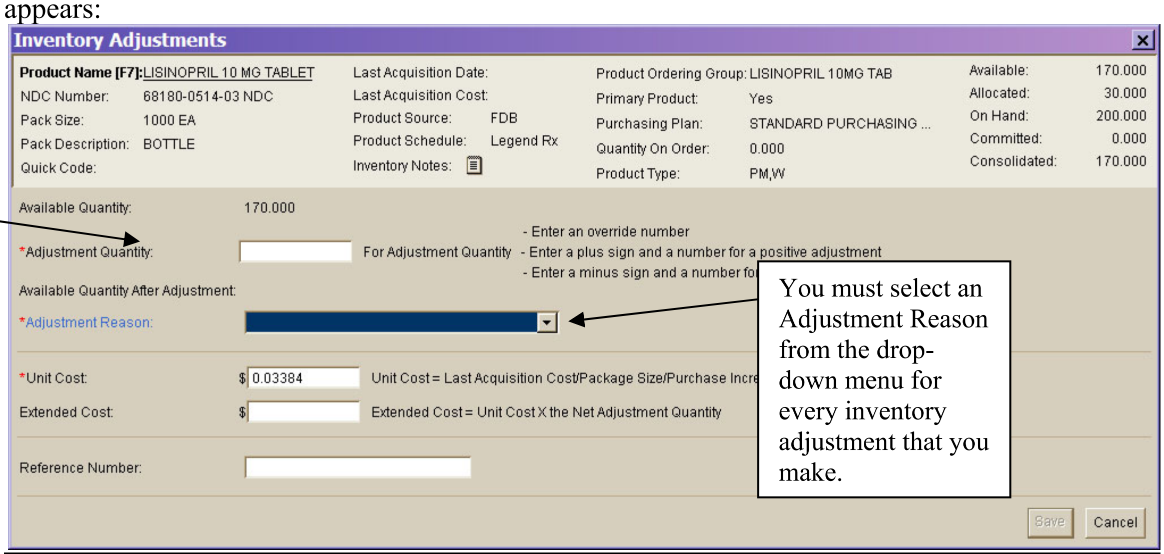


This tab is where you enter order parameters for each product, referred to as override min/max values. The max value can never be lower than the min value. Once the available quantity falls below the override min quantity, the system will order enough product to get above the override max quantity.

Select the Adjustments button to make inventory quantity adjustments. (This button is accessible from all Inventory screen tabs.)

Once you select the Adjustments button, the below Inventory Adjustments screen appears:

Enter Adjustment Quantity here. This can be a positive or negative adjustment, or an override to a specific number.



You must select an Adjustment Reason from the drop-down menu for every inventory adjustment that you make.

Tips

- Since all products are set up on a Standard Purchasing Plan, product will order when the on-hand goes below 0. This is regardless of whether you have Override Min/Max values of blank or 0.
- Some Override Min/Max values are automatically set by Pharmacy Operations based on historical dispensing data and future dispensing expectations (for example, for patient's on ERP).
  - Central Inventory Management currently excludes the following product categories:
    1. OTC's
    2. Products with little or no historical usage in your pharmacy
- When manually setting Override Min/Max values, consider how often the product will be used. If it's a heavily dispensed product, a bigger difference between or Override Min and Override Max will provide you a larger shipment of product at one time instead of 1 bottle at a time. However, the goal is to keep generics at no more than two week's supply and brands even less.

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Module P8:
Compliance Courses

Module Description:
regulations and the importance of compliance to these regulations

Course Name	Course Description	Type	Length	Facilitator
Fraud, Waste and Abuse	CMS requirements regarding Fraud, Waste and Abuse and our related policies	CBT	1hr	Learning
Patient Safety	importance of patient safety, types of errors, identifying root causes, prevention, and responding to customers	CBT	1hr.	
Bloodborne Pathogens and Biomedical Waste	Definition of bloodborne pathogens, general information regarding bloodborne diseases, overview of the Exposure Control Plan, universal precautions and state specific regulations.	CBT	45 min	
iPLEDGE	details about the iPLEDGE program as required by the FDA	CBT	20 min	
Hazardous Waste Policy	Publix policy on disposing of hazardous waste according to EPA guidelines	ILT	30 min	Training Location RPh

Instructions

- All of the courses in the list above must be taken before moving on to any other courses.
- For the CBT programs, log into Learning through Passport on your store's training workstation. Locate each of the Compliance CBTs listed above on your To Do list and click the Start button.

Legend
CBT – Computer based training
ILT – Instructor led training

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name	Hazardous Waste Policy
Course Description	Publix policy on disposing of hazardous waste according to EPA guidelines

The Environmental Protection Agency (EPA) has important guidelines for the identification, handling and disposal of hazardous waste. It's important for you to follow these guidelines to not only protect our environment, but also to reduce the risk of costly fines.

Hazardous Waste Overview

Many prescription items are known hazardous wastes when disposed, including warfarin, tretinoin, benzoyl peroxide, lindane, selenium sulfide, and others. Unfortunately, there is no complete list of hazardous products available to us, therefore, Publix and its employees are not in a position to make a determination regarding a product's hazardous waste status. All unsalable pharmaceuticals are returned to our reverse distribution company (CLS/Medturn) for handling. If any pharmaceuticals cannot be returned to the reverse distributor (e.g., dropped or crushed pills), such damaged pharmaceuticals must be placed into the plastic hazardous waste container stored in the Pharmacy. Pharmacies have an annual hazardous waste pick-up by a hazardous waste contractor.

The EPA has determined that empty stock bottles that contained warfarin (Jantoven, Coumadin, etc.) must be disposed of as hazardous waste, and not discarded in Publix's waste or recycling. Pharmacies have re-sealable hazardous waste bags which are used to store empty warfarin bottles and are picked up annually by a hazardous waste contractor.

Additionally, any prescription product returned by patients is considered hazardous waste since it has no returnable value. Publix pharmacies should never accept unused/expired medication from patients (unless it is recalled or a dispensing error occurred- which should be sent to our reverse distribution company).

Hazardous Waste Policy

No prescription product should ever be thrown in Publix's trash or poured down the sink by either a Publix employee or customer. Hazardous waste containers must be used to store any pharmaceuticals or other designated items (e.g., warfarin stock bottles) that cannot be returned to the reverse distributor (e.g., dropped or crushed pills).

Hazardous waste containers or bags should always be quarantined and stored away from your saleable product and kept tightly closed at all times. Hazardous waste containers or bags should never be emptied or thrown in Publix's regular trash or sink.

For detailed current policy information on disposal of unsaleable prescription products see Ch. 14 of the Pharmacy R&P Guide.

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Module P9:
References and Resources

Module Description:
overview of Publix Connection and many references and resources

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Course Name	Course Description	Type	Facilitator
Publix Connection	access and use of the Pharmacy page, OWA, useforms and other links	ILT	Training Location RPh
Product-Related References	a review of our various product categories and REMS programs	ILT	
Clinical-Related References	a review of our drug reference resources and our clinical programs with related references	ILT	
Managed Care-Related References	a review of third-party billing tools and references	ILT	
Regulatory-related references	a review of regulatory references and resources	ILT	

Legend
ILT – Instructor-led training

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name Publix Connection

Course Description access and use of the Pharmacy page, OWA, useforms and other links

<u>Publix Connection</u>

You will access Publix Connection from the EnterpriseRx Home Page and find these useful tools which your trainer will review with you.

- Pharmacy page – online resources
- Store Quick Links – special links to certain tools (grouped together on Pharmacy page)
- Outlook Web Access (OWA) – email
- Contacts – important contact information (link at top left of Pharmacy page)

Note: Only access websites that are available from this page. You should never use any type of search engine, such as Google. This is against company policy.

Search Publix Connection to make finding documents and websites easier:

- use the Publix Connection search field to find a topic (try "Medicare")
- use the search field on the Useforms tab (*My Workplace* > *Useforms*) to find useforms (try "Pharmacy" in the search field)

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name Product-Related References

Course Description a review of our various product categories and REMS programs

Overview
This section includes key product-related information and references to ensure these products are managed effectively.

Pharmacy Products
- Pharmacy products include
  - prescription drugs
  - over-the-counter (OTC) drugs
  - medical supplies and devices
  - other specialty products
- Products that are dispensed as a prescription are maintained in EnterpriseRx
  - as you order, receive and dispense, the inventory is adjusted in the system
- Suppliers include
  - Publix Pharmacy Warehouse
  - Wholesalers
    - The Wholesaler Procedure/Documentation Guide is located on the Pharmacy page of Publix Connection. It contains information and instructions needed when dealing with our wholesaler. This guide also contains the wholesaler's customer service number to contact them for any issues.
  - secondary suppliers as needed
- Products are stored according to standard inventory sections (Pharmacy R&P Ch. 12)
  - alphabetical order unless in one of these special sections:
    - Fast movers
    - Refrigerator/freezer
    - Narcotics cabinet
    - OTC plan-o-gram
    - Special orders
    - Unsaleables

OTC Products
- OTCs include product
  - behind the pharmacy counter
  - locked in glass cases on the pharmacy sales floor
  - marketed in the display rack
  - on the HBC aisle
- OTCs behind the counter or in locked glass cases
  - OTC Core Item List (*Pharmacy Operations > Ordering Product > OTC Core Item List*)
  - ordered and maintained by the pharmacy
- OTC marketed in display rack
  - Pharmacy Operations notifies you monthly through the Monthly Marketing Plan via the Weekly Memo
  - some marketed product ordered and maintained by pharmacy and some by HBC Clerk

<u>OTC Products (cont.)</u>

- OTCs in grocery aisles
  - ordered and maintained by the grocery department's HBC Clerk
  - contact the HBC Clerk upon recognizing that we are short or out-of-stock

  Important! If the HBC Clerk is unable to order or maintain products necessary for your patient, then order the item from our wholesaler and maintain it in your pharmacy until the grocery item is available.

More about the OTC Core Item List

<u>Ordering OTC Core items</u>

- All OTC items on the OTC Core Item List are set up in EnterpriseRx.
- The balance on-hands for OTC Core Items are maintained by Pharmacy Operations to assist with OTC automatic replenishment.
- Any time you sell an OTC Core item, the balance on-hand is automatically updated the next morning by Pharmacy Operations (Note: Friday, Saturday, and Sunday sales are updated on Monday morning).

<u>Ensuring successful management of this product</u>

- Ensure current balance on-hand is correct by
  - ordering all OTC Core items through EnterpriseRx
    - phone orders and orders placed online with the wholesaler will cause balance on-hand to become inaccurate
    - if necessary to order by phone or online, must manually update inventory balance on-hand
  - always scanning the UPC for these items (do not scan the pink, green or blue sticker).
    - as long as the UPC is scanned at the POS, the sales will be adjusted out of inventory in EntepriseRx that night
    - Friday, Saturday, and Sunday sales are updated on Monday morning
  - maintain Min/Max values that are high enough to ensure enough product is kept in stock between orders

<u>Stocking OTC Core items</u>

- stock according to a "plan-o-gram"
- if your plan-o-gram is not available, contact your Pharmacy Supervisor.

About PSE (these are on the Core Item List)

Storage

- All PSE is maintained behind the counter or in locked glass cases (Georgia law requires that it be behind the counter only – can not be in locked glass cases).

Sales in FL, AL, NC, TN, & SC

- All sales are completed at the pharmacy registers (not at the front of the store).
- All sales must go through NPLEx system.
- Each associate is required a NPLEx login – see the Pharmacy Supervisor.
- The NPLEx web link is on the EnterpriseRx Home Page for easy, daily access.
- If NPLEx is down, you can not sell PSE.
- All transactions must be recorded in the manual logbook with each patient's signature and maintained for 2-yrs. from the date of last entry.
- NPLEx training guide, quick reference and other related materials at *Pharmacy Operations > NPLEx Procedure.*

Sales in GA

- In GA, PSE is considered a Schedule V.
- GA did not adopt NPLEx, so must use traditional manual PSE logbook as required by DEA regulations.
- GA state law requires maintenance of the PSE logbook and PSE invoices for 3 yrs.

Other items on the Core Item List

- There are a variety of other core OTC items that change periodically.
- It is important to make sure your OTC section matches the current plan-o-gram.
- It is also important that all OTC items have a current shelftag. When prices are updated the pricing coordinator should bring new shelftags to the pharmacy.

Drug Registrations or REMS programs

- The FDA introduced the Risk Evaluation and Mitigation Strategies (REMS) to address drug safety, including issues that may have life-threatening consequences.
- Actions mandated by REMS can consist of

  supplemental communication plans or training to alert physicians, pharmacists, and patients of potential risks and to direct safe product use;

  patient registries, restricted distribution, and/or pre-therapy testing requirements; and

  ongoing patient monitoring once therapy is initiated.
- iPLEDGE is an example, however there are many more specialty drugs requiring registration or procedures to follow for ordering and/or dispensing.
- See the Concierge Services section on the Pharmacy page for more information - *Concierge Services > Prescription Services > Drugs and Diseases A – Z.*

Course Name Clinical-Related References

Course Description a review of our drug reference resources and our clinical programs with related references

Overview

This section includes key clinical-related information, programs and references used to exceed quality patient expectations.

Drug References

- Clinical Pharmacology© = main drug reference accessible from EnterpriseRx Home Page
- The References section on the Pharmacy page includes various other links. These links are updated as we identify additional sources.

Link	How to use
Medications During Pregnancy	Additional patient education regarding certain drugs taken while pregnant.
Merck Manuals	Drug and related reference materials
Poison Control Centers	How to contact your state's poison control center.
CDC	Reference about the spread of infectious diseases and their prevention
FDA Orange Book	Used to evaluate the equivalency of a generic product to the associated brand product. If the Orange Book rating starts with an "A," it's equivalent.
FDA	Food and Drug Administration home page. This site can provide you with up-to-date information on new drugs, recalls, shortages, etc.
Location Look Up – Safe Needle Disposal	Use this site to provide patients with safe location to dispose of used needles.

Clinical Programs

We offer a variety of clinical programs to our patients including immunizations, MTM, diabetes management, health screenings and free products. We always look for additional opportunities.

Clinical program information is maintained in the Concierge Services section of the Pharmacy page. Be familiar with all the information in this section of the Pharmacy page.

Understand these Clinical Programs First

Here's a summary of some of the programs that will impact you on a day-to-day basis.

Auto-refill, also called ERP (Enhanced Refill Process)

- Auto-refill helps with medication compliance and is for patients with 1 maintenance prescription (or 2 prescriptions on different day supply cycles). This also helps with workload efficiency for the pharmacy.
- System will prompt you at Reception and RTP to sign a customer up for auto-refill
- Rxs will drop into workflow several days before PDT and patients receive a call or text when ready

Sync Your Refills

- This program will sync up multiple maintenance medications for a patient to reduce the number of times they need to come to the pharmacy for pick-up. This is important for medication compliance and also workflow efficiency.
- The program is managed through PMAP system where a list of eligible patients is provided each day.
- Information about this program is on the pharmacy portal page @ *Concierge Services > Adherence and Compliance > Sync Your Refills*

Free Antibiotic program

- Certain antibiotics are free for a 14-day supply
- See current list of drugs on publix.com
- Bill using
  - proper carrier code and plan (PBX ABPROG)
  - ID = patient's DOB
  - Billing sequence = 2 or greater

Pediatric Antibiotic Follow Up Call Program

- Pediatric call backs are an important part of customer service and compliance
- A daily report is posted on My Reports with patients we will call that day.
- Follow the procedure and call script posted on the portal @ *Concierge Services > Adherence and Compliance > Pediatric Antibiotic Follow Up Calls*

Lisinopril program

- All generic strengths (not combination products); 30-day supply – maximum 60 tablets
- Bill using
  - proper carrier code and plan (PBX ACEPRO)
  - ID = patient's DOB
  - Billing sequence = 2 or greater

Diabetes Management System

- free generic Metformin (immediate release only); ≤ 90 qty & ≤ 30-day supply
  - proper carrier code and plan (PBX DIPROG)
  - ID = patient's DOB
  - Billing sequence = 2 or greater
- patient compliance through ERP (auto-refill) and Sync Your Refills when applicable
- patient register for free Diabetes Health Newsletter via www.publix.com/diabetes
- ongoing ways to save on meters and strips (see the pharmacy portal page @ *Concierge Services > Prescription Services > Drugs and Diseases A-Z*
- customer workshops (see the pharmacy portal page @ *Concierge Services > Wellness Services > Customer Workshops)*

FLAVORx

- Flavoring is ordered through Publix Warehouse using EnterpriseRx.
- The flavoring formulary, coloring guide, etc. is found on the Pharmacy page @ *Concierge Services > Prescription Services > FLAVORx*

Other Clinical Programs

These programs are not part of the *Pharmacist I/New Hire Graduate Intern* training program; however, we want you to start becoming aware of these required programs. You will work with the Pharmacy Supervisor to complete training in these areas once *Pharmacist I/New Hire Graduate Intern* training is complete.

Immunizations

- Publix pharmacists administer influenza, pneumococcal and other vaccinations to patients where permitted by law.
- We participate in flu clinics and accept walk-ups throughout the flu season (and throughout the year in states not limited to influenza vaccination).
- Immunization certification is provided as a benefit to Publix pharmacists along with CPR certification and required OSHA training.
- Information about processing and billing immunizations is on the Pharmacy page at *Concierge Services > Wellness Services > Immunizing Pharmacists*.

MTM

- Publix pharmacists provide comprehensive medication reviews (i.e. brown bag reviews), perform drug utilization reviews and work with patients and their physicians to optimize drug outcomes.
- MTM services are reimbursable, and payments are applied to the respective pharmacy.
- MTM information on specific programs, as well as Publix's reference and procedures for processing and handling these claims is on the Pharmacy page @ *Concierge Services > Wellness Services > MTM Programs.*
- Some MTM sessions are conducted by staff at our Central Pharmacy. You may see placeholder Rx's for these MTM sessions in your EnterpriseRx workflow. These Rx's will have instructions on any action you need to take.

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name Managed Care-Related References

Course Description a review of third-party billing tools and references

Overview
Billing information is maintained on the Pharmacy page @ *Concierge Services > Prescription Services > Billing*. In addition, some tools to assist you with billing issues are available @ *Pharmacy Operations > Quick References > Billing/Third Party*. Knowing this information will help to ensure efficient, effective and proper billing of pharmacy claims

Third-Party Billing Tools/Programs

Third Party Eligibility Check
Tool that helps you find cardholder information and is accessible from the Patient Profile Third Party tab in EnterpriseRx.

Publix Associate Discount Program
- Special brand and generic pricing
- Certain generics priced at $9 for up to a 90-day supply (see Drug List)
- Bill using
  - proper carrier code and plan (PBX PRP)
  - ID = associate's 8-digit personnel #
  - Group = 4-digit store number or if for corporate employee, then 9999
  - Billing sequence = 2 or greater
- All program details located on Pharmacy page at *Concierge Services > Prescription Services > Associate Discount Rx Plan*

Publix Discount Program for Patients
- For customers requesting a discount or to replace a discount card that we do not honor
- No card needed and patient receives discounted pricing on various generic and brand drugs
- Bill using
  - proper carrier code and plan (PBX DC)
  - ID = patient's DOB
  - Billing sequence = 2 or greater

Price quotes
Price quotes can be completed using this criteria in the system:
- Last Name = EnterpriseRx
- First name = First name of your Pharmacy Supervisor
- Select **Publix Direct Care Rx Program** in the *Primacy Third Party:* field

NPI Lookup & DEA Lookup
- Both tools helpful for updating, correcting, or validating prescriber information
  - upon set up of a new prescriber or
  - upon learning that there's a billing issue involving a prescriber
- DEA lookup is at the bottom of the Pharmacy page of Publix Connection
- NPI lookup is on the Home Page of EnterpriseRx

OTC Benefit Programs

- Help the customer save money on OTC qualifying drugs through their insurance
- Become familiar with the information on the Pharmacy page @ *Concierge Services > Prescription Services > Billing > OTC Programs*

Competitor coupons and price matching

- We accept competitor coupons.
- We also price match on cash prescriptions in certain situations. Refer to the Price Override Policy in Ch. 8 of the Pharmacy R&P Guide for price matching guidelines.

Other

Other important information @ *Concierge services > Prescription Services > Billing* includes:

- Insurance billing information
- Insurance websites
- Medicare and Medicaid information
- Third- party audit information and tips to avoid negative audit results

Third-Party Billing Assistance

We have various documents on the Pharmacy page to assist with handling adjudication rejections:

- *Pharmacy Operations > Quick References > Billing/Third Party*
- *Pharmacy Operations > Quick References > Workload Balancing – Central Processing –* this helps you understand the rules of the road when it comes to Central Pharmacy's assistance with exception queues

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name Regulatory-Related References

Course Description a review of regulatory references and resources

Overview
Key reference materials used to ensure compliance with regulations are located on the Pharmacy page.

Note: A licensed pharmacist is responsible for maintaining knowledge of the law. As a company, we will also provide information and direction to maintain compliance with laws and regulations.

Regulatory references
Links maintained on the Pharmacy page:

Board/Agency	Location	How used/referenced

State Board of Pharmacy (BoP) Websites	Pharmacy page: *References > Pharmacy Boards and Government Agencies*	• Each BoP website is available for reference and each pharmacist should be familiar with its content. Use for
		  • referencing particular laws and rules
		  • keeping up with changes to laws and rules, and
		  • understanding new laws and rules.
		• All pharmacists must be able to show inspectors that they not only have access to the BoP website, but that they understand how to find the pharmacy laws and rules.

DEA Diversion Control Program		• This website contains information about the handling/processing of controlled substances.
		• It also provides a direct link to DEA Form 106 which should only be used upon direction of the Pharmacy Supervisor.
		  • Form 106 is for reporting theft or loss of controlled substances to the DEA.
		  • See Chapter 8 of the Pharmacy R&P, Losses and Theft of Controlled Substances.

Georgia Drugs and Narcotics		• This is the GA agency that is responsible for enforcement of the laws and rules pertaining to drugs and narcotics. • GA pharmacists must be able to access this site from the pharmacy and show inspectors that they are knowledgeable of this site.

Regulatory references (cont'd)

Board/Agency	Location	How used/referenced
Pharmacy R&P Guide	Pharmacy page: *References > Pharmacy R&P Guide*	• Contains important policies and procedures to ensure compliance to various regulations. • The content in the R&P works in conjunction with our new hire orientation and training program. • All associates should be familiar with the information in the R&P. • These chapters contain various regulatory references: ○ Ch. 7, HIPAA ○ Ch. 8, Regulations and Associated Publix Policies ○ Ch. 11, Ordering and Receiving ○ Ch. 14, Safety and Security ○ Ch. 15, Sanitation

Note: Links for each state's prescription drug monitoring system (PDMP) for controlled substances are located on the Home page of EnterpriseRx.

Pharmacy Accordion File

The accordion file exists in the pharmacy to hold important required documentation to be easily accessible when inspectors come in. Your training pharmacist will review the contents and requirements with you.

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Module P10:
Publix Pharmacy

Module Description:
Concierge concept, competitive advantage, organization, administrative processes, policies/procedures

Course Name	Course Description	Type	Facilitator
Pharmacy Concierge Services	Publix Pharmacy premier customer service and the Concierge Services concept	Video	Learning
Publix Pharmacy at Moffitt	Highlights our Publix Pharmacy at Moffitt Cancer Center	Video	
Rxcellence Award	Highlights our annual Rxcellence Award winning pharmacy teams	Video	
Welcome to Publix Pharmacy	welcome message, customer service to concierge, the Publix Pharmacy difference, awards, accolades	ILT	Supervisor
About Publix Pharmacy	organizational structure, administrative processes, important policies & procedures, who to contact	ILT	

Legend
ILT – Instructor-led training

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name:	Pharmacy Concierge Services
Course Description:	Publix Pharmacy premier customer service and the Concierge Services concept
Course Type:	Video
How to Access:	Log into Learning through Passport on your store's training workstation. Locate the Pharmacy Concierge Services Video on your To Do list and click the Start button.

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name: Publix Pharmacy at Moffitt

Course Description: Highlights our Publix Pharmacy at Moffitt Cancer Center

Course Type: Video

How to Access: Log into Learning through Passport on your store's training workstation. Locate the Publix Pharmacy at Moffitt video on your To Do list and click the Start button.

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name:	Rxcellence Award
Course Description:	Highlights our annual Rxcellence Award winning pharmacy teams
Course Type:	Video
How to Access:	Log into Learning through Passport on your store's training workstation. Locate the Rxcellence Award video on your To Do list and click the Start button.

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name	Welcome to Publix Pharmacy
Course Description	welcome message, leading edge: customer service to concierge concept, basic expectations, awards and accolades

Your Supervisor will cover various important pieces of information with you, so that by the end of this session you should understand how Publix is different from other retailers and how that makes it a great place to work and shop!

Publix Mission Statement
Our Mission at Publix is to be the **premier quality food retailer in the world**.

To that end we commit to be:
- Passionately focused on ***Customer Value***,
- **Intolerant of Waste**,
- Dedicated to the ***Dignity***, ***Value*** and ***Employment Security*** of our **Associates**,
- **Devoted** to the highest standards of **stewardship** for our **Stockholders**, and
- **Involved** as Responsible ***Citizens*** in our **Communities**.

Concierge Services
Information on specialty drug programs as well as some disease states, such as Diabetes or Oncology, are grouped on the Pharmacy page in the *Concierge Services* section. This makes it easy to access information for our patients whenever they need it.

Here you can find information for each specialty drug such as billing information, procurement information, applicable clinical information, and general what-to-do's when filling each specific medication.

Having all of this information accessible to assist our patients helps us to reach our goals as premier healthcare providers!

Take-aways!
- **We are our customer's Concierge for Healthcare!** Customers come to us for MUCH more than filling prescription!
- Be Caring and Attentive to your patients!
- Treat your patients with respect and empathy
- Keep your pharmacy clean, neat and orderly!
- Work with a little pep in your step and with purpose!
- Maintain confidentiality!
- Follow Publix policies and procedures!
- Be committed to your role as a Pharmacist!

In closing!
In the words of our founder, George W. Jenkins, "Publix will be a better place or not quite as good because of you."

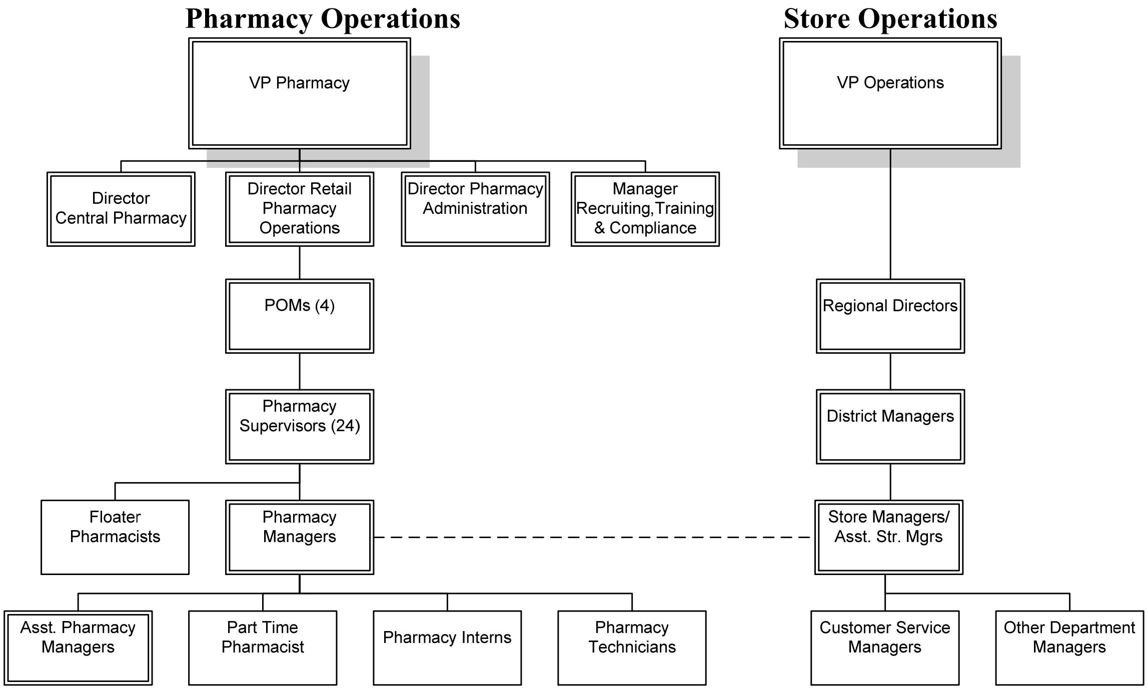
We thank you for joining the Publix Pharmacy Team and hope you understand the importance of your role in making Publix Pharmacy a success.

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name About Publix Pharmacy

Course Description organizational structure, corporate functions, important programs

Organizational structure



You report up through the Pharmacy Operations organization, but you do have some responsibility to the Store Manager. Always call your Pharmacy Supervisor for information, direction, and feedback.

General administrative processes & Important policies

Your Supervisor will cover various information with you. These resources are available to you for reviewing the information covered:

- New Pharmacist/Graduate Intern Binder
- Pharmacy Reference & Procedures (R&P) Guide
- Your Pharmacy Supervisor is always available for questions!

Who to Contact

- Your Pharmacy Supervisor
- Your Partner
- See Flip Card on monitors in the pharmacy
- See Contacts link at the top left of the Pharmacy page

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Module P11:
Exception Queue Management

Module Description:
Overview of Contact Manager, Inbound Communication & Adjudication Exception

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Course Name	Course Description	Type	Facilitator
Contact Manager & Inbound Communication	understanding how Contact Manager and Inbound Communication queues relate; processing refill renewal requests; processing prescriber refill responses and new Rxs via PPI; using contact manager for new Rx requests, Rx clarifications and failed PAs	ILT	Training Location RPh
Adjudication Exceptions and other exception queues	adjudication exception screen, handling rejections, rebilling, General Exceptions, BAR Exception queue	ILT	

Legend
ILT – Instructor-led training

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name Contact Manager and Inbound Communication

Course Description understanding how Contact Manager and Inbound Communication queues relate; processing refill renewal requests; processing prescriber refill responses and new Rxs via PPI; using contact manager for new Rx requests, Rx clarifications and failed PAs

Overview

- The Contact Manager (CM) queue is used for processing refill renewal requests sent to prescribers on behalf of the patient, as well as managing other forms of contacts including new Rx requests, Rx Clarifications and Central Processing PAs that have been unsuccessful and require retail level assistance.
- The Inbound Communication queue is where prescriber e-prescriptions and faxes are received. These may be in the form of refill request approvals or new prescriptions.
- It is a primary responsibility of each pharmacy to maintain the CM queue including entering accurate Promise Dates and Times (PDT) which is used to appropriately manage these events according to the customers expectations.
- Central Pharmacy does assist with CM and IC where permitted by law – this concept is covered in Module 12.
- An associate must be assigned to work the CM and IC queues every day - in the early morning and mid-afternoon.

How do these queues work?

Refill Renewal Requests:

Initiating a refill request from the pharmacy

- Refer to this document on the pharmacy portal page for some background information and overview of how CM works - *Pharmacy Operations > Quick References > Workflow > Contact Manager Basics – Part 1* (pgs. 1-4).
- Review the popup that is received when trying to refill an Rx with no refills.
- When a request is initiated, a transaction will automatically be sent to the Contact Manager queue with an *Initiate Request* status and the system will automatically fax or e-prescribe that request to the prescriber. (Few prescribers only accept phoned in requests and if so, that can be set up in the system.)
- The refill request goes to the Contact Manager (CM) queue awaiting a reply from the prescriber. (The CM queue organizes all of your refill renewal requests in one location within the system.)

Handling PPI or Fax failures when sending refill renewal requests:

- Refer to this document on the pharmacy portal page for detailed examples of how to identify and handle PPI or fax failure by viewing the event log on the CM screen - *Pharmacy Operations > Quick References > Workflow > Contact Manager Basics – Part 1* (pgs. 4-6).
- There are various reasons that a PPI or fax may fail. The important thing is to evaluate CM events with an *Initiate Request* status and evaluate the information in the event log on the CM screen.

Prescriber refill approvals

- Refer to this document on the pharmacy portal page for some background information and overview of how CM works - *Pharmacy Operations > Quick References > Workflow > Contact Manager Basics – Part 1* (pgs. 6-9).
- When a prescriber uses e-prescribing (PPI) or faxing to respond to a refill renewal request the response is received by the pharmacy system and matched to the related CM event in the queue as long as certain information matches perfectly (e.g., patient name, date of birth, drug).
- If the system cannot make a match, the response to the refill renewal request stops in the Inbound Communication queue for someone to review and match to an existing request in the CM queue or to a patient.

Advancing a 3-day supply on a refill renewal request:

- Refer to this document on the pharmacy portal page - *Pharmacy Operations > Quick References > Workflow > Advancing Medication on a Refill Renewal Request.*
- Review how to advance a 3-day supply to ensure patient is taken care of and inventory is handled properly.
- **Be sure to enter a Transaction Note** from the Contact Manager Details screen stating that "the patient was given a 3-day supply - deduct this quantity from the fill".

New Rx requests:
Refer to this document on the pharmacy portal page - *Pharmacy Operations > Quick References > Workflow > Contact Manager Part 2.*

Initiating a New Rx Request
- When a patient comes in with a transfer with no refills or if they say they've been taking their medications differently per the doctor's instruction, then a New Rx Request can be set up in the system and managed in Contact Manager.
- The CM event maintains the status of the request whether it's called or faxed into the prescriber. The key is that the details are maintained in the system for any user to reference and work on until the new prescription is either approved or denied.

Receiving a prescriber's new Rx request:
- When a prescriber transmits a new prescription via e-prescribing (PPI), it will go right into workflow if it matches on several pieces of information (e.g., name, birth date). If the system cannot make a match, the response to the New Rx request stops in the Inbound Communication queue for someone to review and match to an existing request in the CM queue or to a patient.
- Whether the response is electronic, fax or oral, the CM event must be updated and it can be further processed using the Approve With Changes button.

Rx Clarification requests:
Refer to this document on the pharmacy portal page - *Pharmacy Operations > Quick References > Workflow > Contact Manager Part 2.*

Initiating a Rx Clarification Request
- When a prescription is difficult to read or interpret, then a Rx Clarification Request can be set up in the system and managed in Contact Manager.
- The CM event maintains the status of the request whether it's called or faxed into the prescriber. The key is that the details are maintained in the system for any user to reference and work on until the new prescription is either approved or denied.

Receiving a prescriber's new Rx request:
- If a prescriber transmits a new prescription via e-prescribing (PPI), it will go right into workflow if it matches on several pieces of information (e.g., name, birth date). If the system cannot make a match, the response from the prescriber stops in the Inbound Communication queue for someone to review and match to an existing request in the CM queue or to a patient.
- Whether the response is electronic, fax or oral, the CM event must be updated and it can be further processed using the Approve With Changes button.

Central Prior Authorization Request Failures:
Refer to this document on the pharmacy portal page - *Pharmacy Operations > Quick References > Workflow > Contact Manager Part 3.*

- Occasionally, Central Pharmacy is unable to get a prior authorization approved by a third-party payer. Central Pharmacy contacts the prescriber 3 times, requesting their help in getting the PA approval. After doing so, we consider the attempt "failed". Also, if a prescriber or insurer "denies it quickly" we will treat it the same way
- Once the PA process has failed, Central Pharmacy will move the transaction from the Adjudication Exception queue to the Contact Manager (CM) queue with a Contact Reason of *Adjudication Exception*. This enables the local pharmacy to handle the prescription from that point working with the patient, insurance, and prescriber as necessary.

Keys to taking advantage of automation!
The system will automatically fax or e-prescribe (PPI) a refill request to the prescriber, if the prescriber profile is set up correctly with

- the *Contact* field is set to "Fax" (never set this field to "PPI")
- an accurate fax #, and
- with correct PPI information (if the prescriber uses electronic prescribing).

When this is complete, the system will automatically fax or PPI prescriptions accordingly. Also, if PPI is down, a fax will automatically send to the prescriber instead.

The Contact field in the Prescriber Profile

***Contact* field**	**Action**
Do Not Contact	a refill request will not transmit to the prescriber. This is only used when prescribers prefer the patient to request refills.
Fax	a refill request will be • transmitted to the prescriber via fax, or • e-prescribed (PPI) to the prescriber if the prescriber subscribes to the e-prescribing service and we have them set up properly in our system. Note: See Module 7, Prescriber Profile for information on PPI set up.
PPI	a refill request will only transmit via PPI. Note: You should never use this setting because it will limit your options when the e-prescribing service is down.
Phone	An associate will need to initiate the refill request by calling the prescriber or manually faxing the prescriber. However, if the prescriber accepts fax requests, then: • update the prescriber profile with the fax number • re-set the *Contact* field in the Prescriber Profile to Fax, and • re-initiate the refill renewal request (so that the system will fax the request this time and going forward).

A closer look at Contact Manager

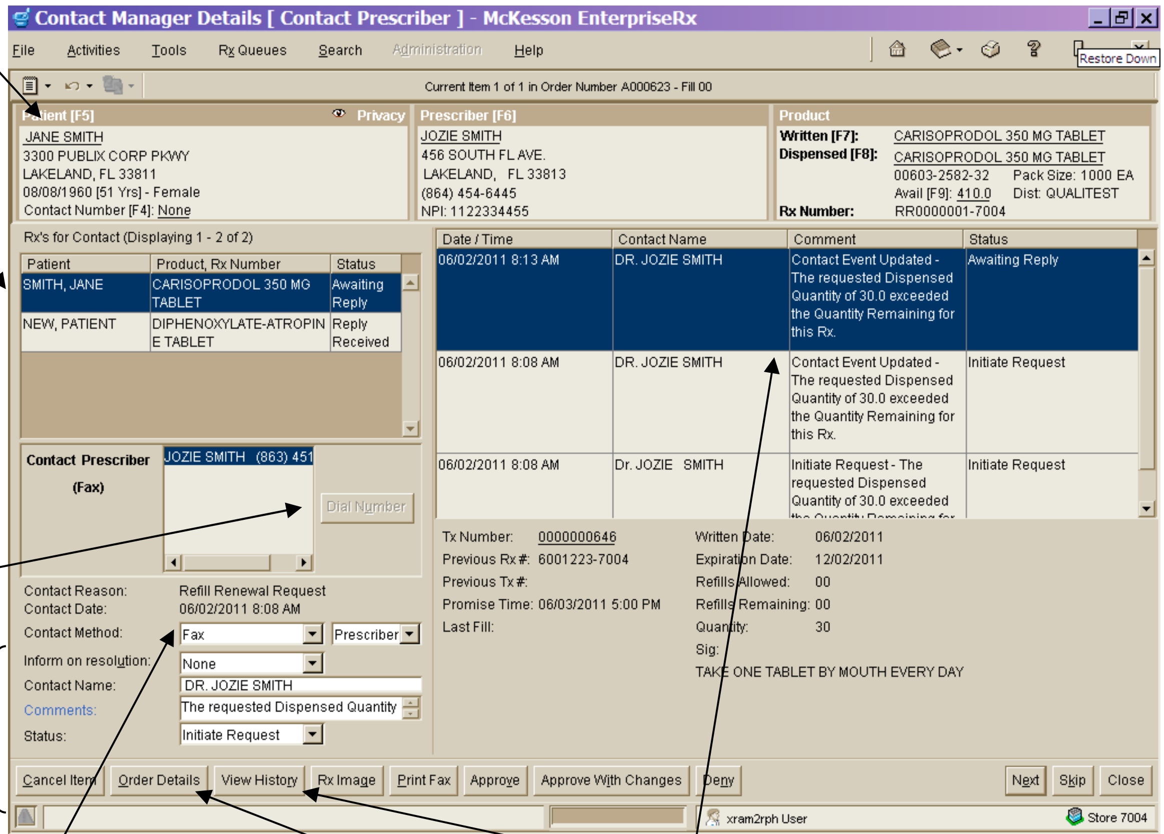
Understanding the Contact Manager screen

Profiles can be accessed via hyperlinks.

All prescriptions in CM for a patient are listed here with status and the prescriber name and # below.

You cannot dial a phone number through the system at this time.

Various contact information and fields to manually add information about work you have done on this transaction. Manually updated when it's a "phone" contact



For PPI & Fax to work seamlessly, the Contact Method must be set to Fax. (Do not set to PPI! And only set to Phone if the Dr. only accepts phone requests.)

The status of the Rx request is automatically updated here unless it's a Phone event. (Phone events should be rare.)

History of contact events are in this Event log and a more detailed history can be accessed using the View History button at the bottom of the screen.

- Hyperlink to the prescriber profile to add a fax number, change the contact method to fax – this will update the contact method in the CM event and for future fills.
- Use the CM history to understand the status. Review the fax messaging statuses on the Pharmacy page @ *Pharmacy Operations > Quick References > Workflow > Electronic Fax Message Delivery Status Codes*
- Avoid accidentally setting up a duplicate Rx for a patient by reviewing the patient's profile before approving the event.
- The Approve with Changes button – used when the prescriber faxes approval of the refill and provides opportunity to scan new image

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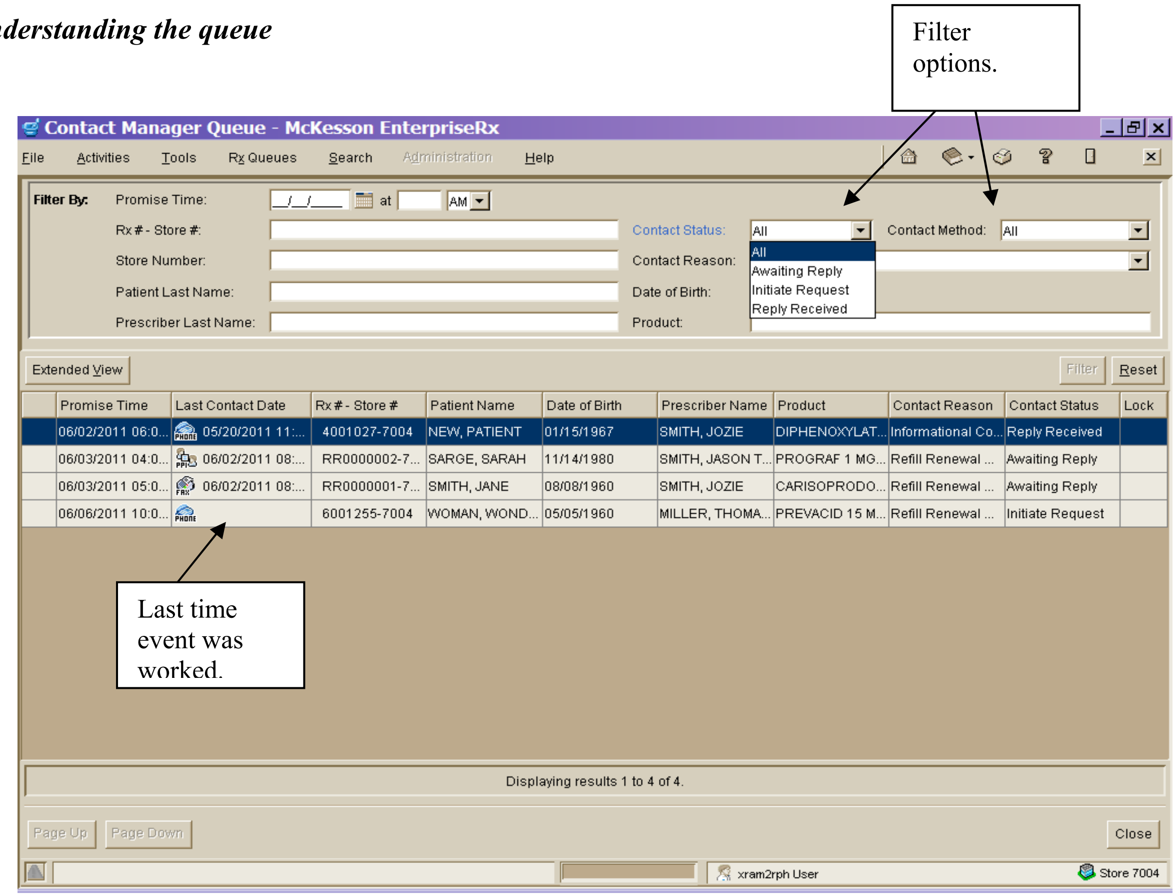
Understanding the queue

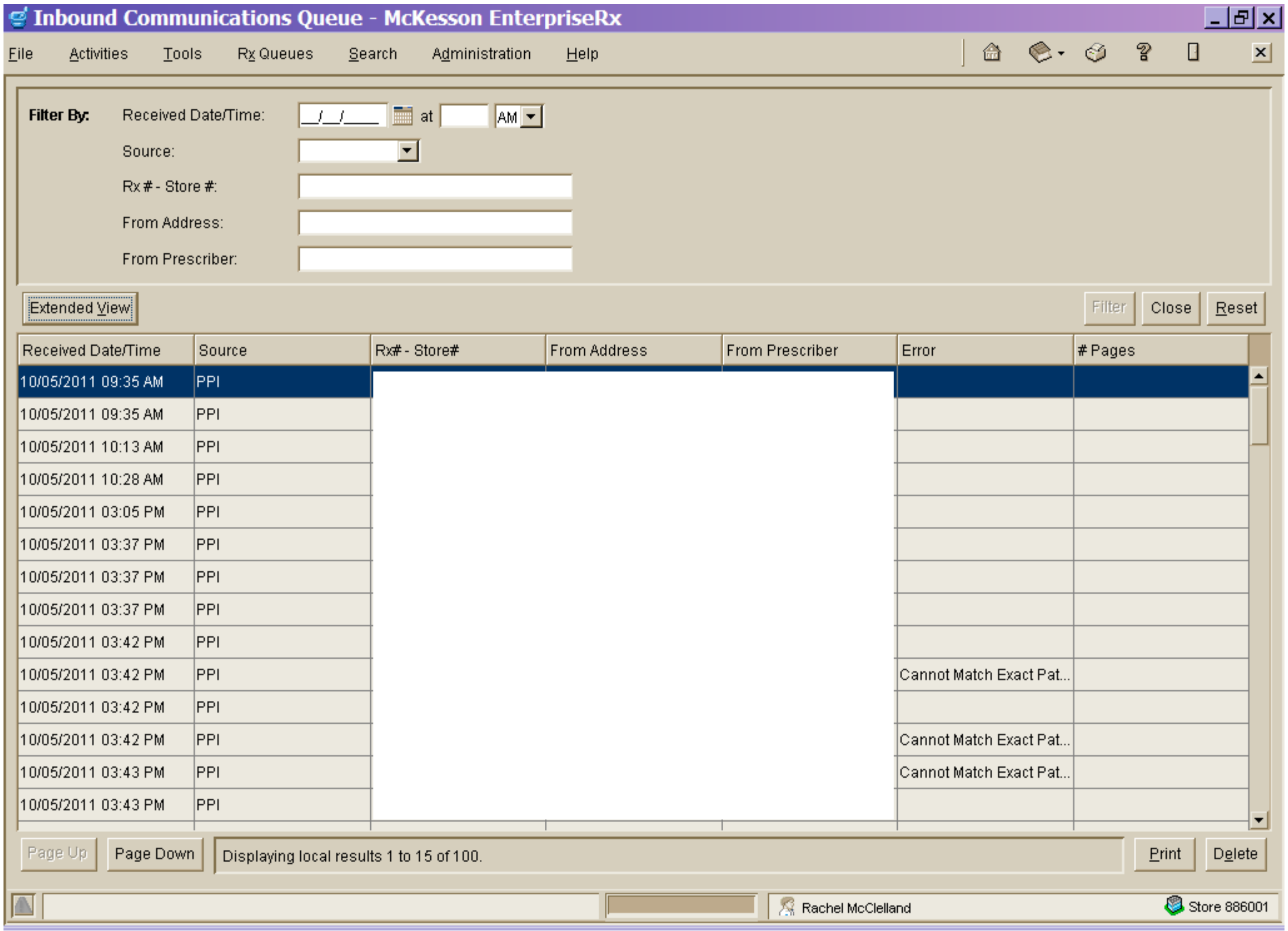


<u>Tips</u>

- From the queue, understand the last time a CM event was worked and how that relates to the PDT. Use this information to act on a CM event.
- Filtering is extremely helpful when managing the different types of events in the queue.
- Carefully review the Contact Manager Basics document on the Pharmacy page @ *Pharmacy Operations > Quick References > Workflow > Contact Manager Basics*.

A Closer look at Inbound Communication

Prescriber refill renewal responses and new prescriptions can be sitting in this queue waiting to be processed.



Tips

- There's a workaround for PPIs that come through without an image. Review the documented workaround at *Pharmacy Operations > Quick References > Workflow > Work-around for Rx in ICQ with No PPI Image*

Working the Inbound Communication (IC) queue

- First, evaluate each transaction in the queue very carefully
  - Is it a new or renewal prescription?
  - Is it a rejection as indicated by the messages in the Error column of the IC screen?
  - If it's new, does it have all pertinent information on the hard copy?
  - If it's a renewal, is it an approval, an approval with changes, or a denial/rejection?
- Second, match the Rx to a CM event (following the system prompts) or patient (using patient search protocol).

If a transaction in Inbound Communication is a…	…then perform the following steps from the IC queue
rejected Transaction	• verify the rejection message in the Error column on the screen and notice that the hard copy image has a "refill renewal request" heading • delete/cancel this transaction, then go to the CM queue and re-transmit the refill request
new Rx	• review the hard copy image to verify that this is a New Rx • verify that the information on the hard copy is legible and complete • review the Error column for messages as to why the Rx can not be matched to a patient in the pharmacy system • use the patient search protocol to match the prescription to a patient profile • verify that there is not a similar prescription in the CM queue for this patient (sometimes prescribers send approved refill requests as new prescriptions)
refill renewal response – approval	• review the top of the hard copy image to verify that this is an approved refill renewal • review the Error column for messages as to why the Rx can not be matched to a CM event in the pharmacy system • associate the transaction with a CM event and follow it to the CM queue where the Tx can be "approved" • if a CM event does not exist, then use the patient search protocol to match the prescription to a patient profile
refill renewal response – approve with changes	• review the top of the hard copy image to verify that this is an approved refill renewal with changes • review the Error column for messages as to why the Rx can not be matched to a CM event in the pharmacy system • associate the transaction with a CM event and follow it to the CM queue where the Tx can be "approved with changes" • if a CM event does not exist, then use the patient search protocol to match the prescription to a patient profile
refill renewal response – denial or rejection	• review the top of the hard copy image to verify that this is a denied refill renewal • associate the transaction with a CM event and follow it to the CM queue where the Tx can be "denied"

<u>Managing these Queues</u>

- One of the keys to success is ensuring the queues are reviewed and worked daily – morning and afternoon.
- Review detailed information on working Contact Manager on the Pharmacy page @ *Pharmacy Operations > Quick References > Workflow* – then look under the **Contact Manager and Inbound Communications** heading.

Pharmacist I/New Hire Graduate Intern Training
Required Courses

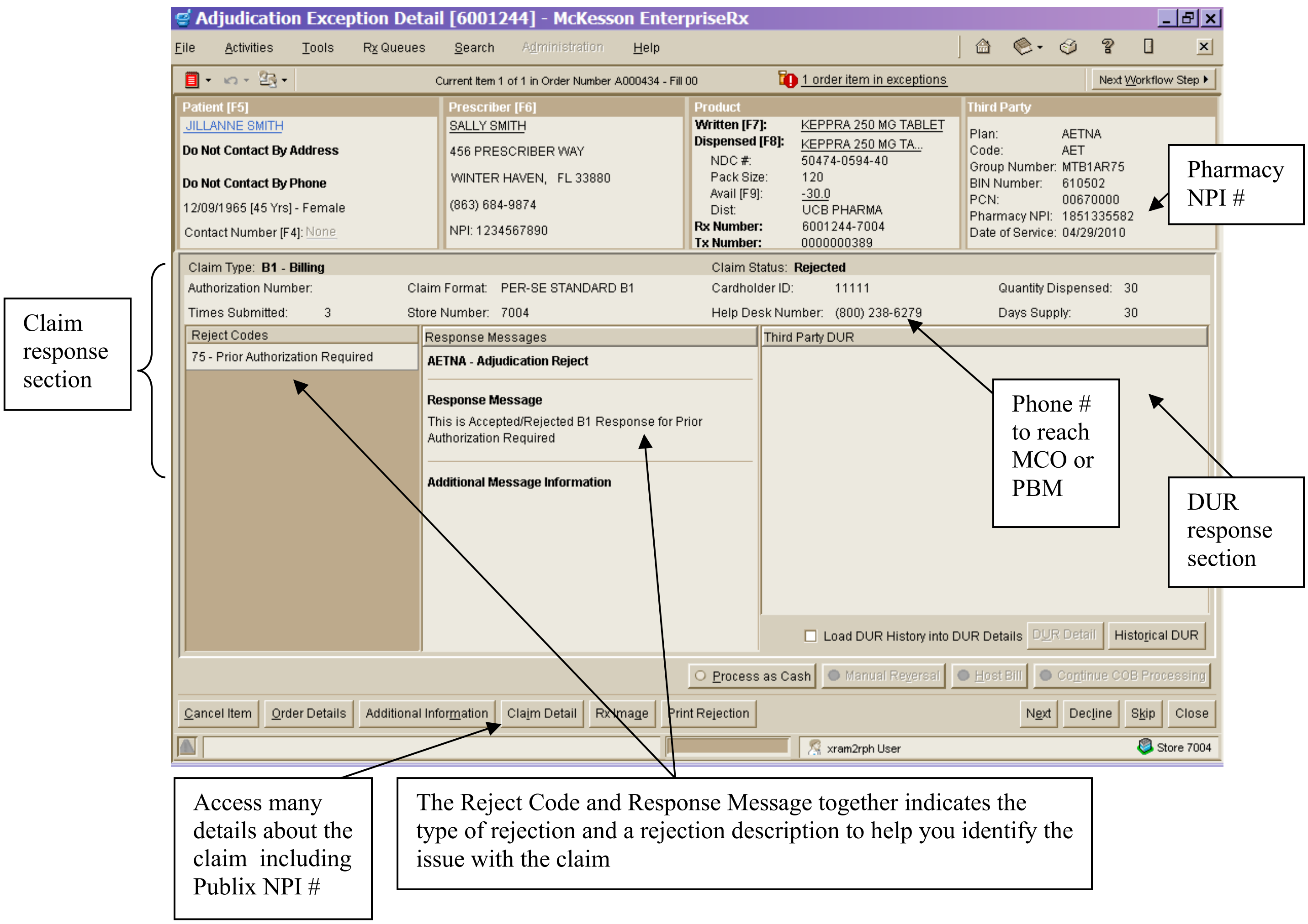
Course Name Adjudication Exceptions

Course Description adjudication exception screen, handling rejections, rebilling, General Exceptions, BAR Exception queue

Overview

- An *adjudication exception* is a claim that results in a rejection of coverage and payment.
- You must determine what's causing the rejection and how to correct the issue to continue billing and filling the prescription.

A Closer Look at the Adjudication Exception Screen



Resolving Adjudication Exceptions

Resolving rejections is tackled like any other problem:

1. Define and clarify the problem.
2. Identify the potential causes of the problem.
3. Identify and evaluate options for fixing the problem.
4. Identify the best option and implement a solution to the problem.

Define and clarify the problem

First, understand the two main types of rejections, how they are presented on the Adjudication Exception screen and how to understand the rejection response from the MCO or PBM.

Type of rejection	**How presented on the Adjudication Exception screen**	**Description**
Insurance rejection	The Reject Code and Response Message on the Adjudication Exception screen will look like this: ***Reject Code:*** *code # with short description* ***Response Message:*** *Adjudication_Reject* *Rejection description would show up here*	An *insurance rejection* is a result of the MCO or PBM's comparison of the claim information to the patient's insurance benefit. Any issues with coverage or drug utilization will result in a rejection.
Publix edit	The Reject Code and Response Message on the Adjudication Exception screen will look like this: ***Reject Code:*** may or may not have a code # & description ***Response Message:*** *Adjudication_Reject* **Pub* ##### with rejection description here*	A *Pub Edit* is a Publix edit that is set up by a separate processor, called a clearing house, that evaluates the claim prior to sending it on to the MCO or PBM. It identifies problems with the claim billing that aren't related to the patient's coverage, but will cause problems with receiving a paid claim from the MCO or PBM. A Pub edit that requires the pharmacy to fix something on the claim will present itself at the time the clearing house evaluation is completed. Once this type of Pub edit is resolved, the claim will continue on to the MCO or PBM for an evaluation against the patient's insurance benefits. A Pub edit that is informational (identified as a "warning") will result in the claim continuing on to the MCO or PBM. Then the Pub edit and any MCO or PBM rejections will be presented at the same time to the pharmacy.
Publix edit (warning only)	The Reject Code and Response Message on the Adjudication Exception screen will look like this: ***Reject Code:*** none ***Response Message:*** *Adjudication_Reject* **Pub* ##### Warning with rejection description here* If the Pub edit warning is presented in combination with an insurance rejection, it will look like this: ***Reject Code:*** *code # with short description* (for the insurance rejection only) ***Response Message:*** *Adjudication_Reject* **Pub* ##### Warning with rejection description here* *Then the insurance reject message would be here*	

Identify the potential causes of the problem
Below is a list of some general rejection categories and possible causes.

Rejection category	Rejection description	Potential causes
Refill too soon	This indicates that the refill cannot be completed at this time considering the days supply on the last fill.	• prescription is being processed before the patient should be receiving the prescription • the last fill of the prescription has incorrect days supply
Prior authorization (PA) required	This means the prescriber or the patient's insurance must provide a PA in order for the prescription to be filled.	• patient's insurance benefit requires a PA for the drug being dispensed • a brand was selected when a generic could have been selected instead
Missing or invalid days supply	This means there's something incorrect about the days supply included on the claim.	• the days supply field was not completed in data entry • a sig code was not used in data entry causing days supply to not automatically calculate properly • days supply was not properly calculated in data entry
Patient is not covered	This means the patient isn't covered by the insurance receiving the claim.	• patient may have changed insurance plans • patient's cardholder ID/group # may be wrong • the wrong insurance plan could have been added to the patient's profile
Non-match cardholder ID or person code	This means the patient's cardholder ID or person code doesn't match the insurance eligibility records.	• the information on the patient's insurance card may have been entered incorrectly • the patient's insurance card may have incorrect information on it
Plan limitations exceeded	This means that the quantity being dispensed or the days supply exceeds the amount allowed by the insurance.	• the quantity entered in data entry may be incorrect • the days supply entered/calculated in data entry may be incorrect • may be attempting to fill a larger quantity of the medication than the third-party will allow
Product service not covered	This means the dispensed drug is not covered by the insurance.	• a non-formulary drug was selected • a brand was selected instead of a generic • the particular drug is not covered
DUR rejection	This means a clinical conflict was identified by the third-party.	• patient may have prescriptions filled at non-Publix pharmacies that are causing the conflict • patient may have other personal information filed with their insurance company indicating a conflict with the drug being dispensed
Missing or invalid pharmacy # or provider qualifier	This means there's an issue with the setup of our pharmacy in the insurance plan's provider network.	• the insurance may not have enrolled our pharmacy in the program properly • Publix may not be in that insurance plan's network of pharmacy providers
Non-match prescriber ID	The prescriber information on the claim is incorrect.	• The prescriber's name doesn't match the NPI, DEA or license # information. • The prescriber license has been deactivated.

Identify and evaluate options for fixing the problem
Quite a few components of a prescription may need to be evaluated to narrow down the cause of the issue. This includes validating some of the following pieces of information:

- TP information on a patient profile
- the last fill of a prescription on the Rx tab of a patient profile
- key data entry details against the hard copy on the Rx tab of a patient profile
- details about the transaction like date of service, days supply, patient pay amounts, and insurance claim details on the Tx tab of a patient profile
- prescriber ID information on a prescriber profile
- supervising prescriber information for PAs and ARNPs

Identify the best option and implement a solution to the problem
Once you've determined the cause, there are typically a few ways to fix it; however, we find that following this rule of thumb ensures the claim is processed correctly.

If you need to correct…	…then
something in a patient or prescriber profile	• decline the prescription back to data entry • correct the information in the profile, then • resubmit the claim
information located the Additional Information screen	• click the Additional Information button • correct/add to the appropriate field • click off the field and SAVE the changes, then • resubmit the claim

Rebilling a Prescription
Follow this rule of thumb for rebilling a claim.

If the prescription…	…and	…then
is not released from the pharmacy system	you need to correct something in the patient profile to rebill it	From the Release to Patient screen: • use the Patient Profile button to access the patient's profile to add or correct TP information, then • use the Edit TP button to select the correct TP and reprocess the claim. Note: This avoids a lot of re-work through the queues.
	you need to correct something in the Rx details in data entry	From the Release to Patient screen: • decline the prescription to edit data entry, then • correct the issue and push the prescription back through workflow.
is already released (sold in the pharmacy system)	you need to: • bill to a different insurance or cash, or • correct the days supply	• from the Search menu, find the patient's profile and update TP information as necessary, then • from the Tools menu, use the Bill After Release function to rebill the prescription. Note: This function can't be used for Partial Fills, but is a great feature for other situations. You avoid having to bring the transaction back into workflow and it also keeps the patient's release to patient signatures in tact.
	you need to correct something in the Rx details in data entry	This option involves some discussion with your pharmacist. Depending on the date of service, you may not be able to bring it back into workflow without a call to the Publix Support Desk. However, if you are dealing with the most current fill of the prescription, your pharmacist may have access to change the status of the prescription to bring it back into workflow and correct the problem.

More about Bill After Release and Edit Third-Party

Bill After Release

- Refer to the documents on the pharmacy portal page at *Pharmacy Operations > Quick References > Billing/Third Party > Bill After Release (BAR)* and *Edit Third Party at Release.*
- Bill after Release can only be use once the prescription has been released to the patient. Sometimes things come up after that point and this is a simpler way to address some issues without having the bring the prescription back into workflow.
    - prescriptions billed and sold as cash that need to be billed to a TP
    - prescriptions sold and billed to an incorrect TP that need to be billed to another TP
    - prescriptions billed or needing to be billed as a coordination of benefits (COB) and
    - when changing the days supply within a re-submission window.
- BAR can not be used for Partial Fills because partial fills are not billed to insurance. The billing for these transactions is upon the Completion Fill.
- When using BAR the patient's original signature from Release to Patient is kept with the transaction.
- When using BAR new labels and paperwork automatically prints.
- An adjudication exception using BAR results in the claim going into the BAR Exception queue. This queue needs to be reviewed on a regular basis.

Edit Third Party at Release

- If an Rx has a status of Ready and needs to be re-billed, use the Edit Third Party button on the Release to Patient screen. This will complete reversal and resubmission in one easy task.

Other information about pharmacy billing

Show the new hire the reference documents @ *Pharmacy Operations > Quick References > Billing/Third Party.*

General Exceptions

Review the General Exception queue explaining that occasionally if the system can't process a claim due to a system network disruption or some other technical issue, then the system will push the claim to General Exception. This issue may need to be called into the Pharmacy Support Desk.

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Module P12:
Other Tools and Functions

Module Description:
a review of various system tools and functions outside of workflow

Course Name	Course Description	Type	Facilitator
Pharmacy System Tools	a review of various tools used when filling, billing and releasing prescriptions; how to perform price quotes; how to return items to stock and more	ILT	Training Location RPh
Other Pharmacy System Functions	a review of centralized functions and other services made possible with a centralized pharmacy system	ILT	

Legend
ILT – Instructor-led training

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name	Pharmacy System Tools
Course Description	a review of various tools used when filling, billing and releasing prescriptions; how to perform price quotes; how to return items to stock and more

Overview

Various tools have been covered in other sections of this training program. These are additional tools that are important to understand.

Rx Status Change

- Typically used when a patient has determined they do not want a prescription that has already been sold to the patient.
- The prescription status is changed from Sold to Ready then cancelled (i.e., credit returning the claim and returning the medication to inventory.)
- Read the document on the Pharmacy page @ *Pharmacy Operations> Quick References > Workflow > Credit Returning an Rx using Rx Status Change and Cancel Item*.

Copy Rx

- Used to re-assign a prescription when there are data entry issues identified after the initial fill.
- Examples include:
  - written product selected is discontinued or
  - data entry error is found on a refill Rx.
- The original prescription will be inactivated once this function is performed.
- Read to the document on the Pharmacy page @ *Pharmacy Operations > Quick References > Workflow > Re-assigning an Rx Using the Copy Rx Function*.

Return to Stock

- Each day (see Pharmacy Task Checklist) prescriptions in will-call for 10 days or more are returned to stock.
- A Return to Stock report is run and once the prescriptions are pulled from will-call, the claims can be returned to stock in the system with a click of a button.
- Read the document on the Pharmacy page @ *Pharmacy Operations > Quick References > Return to Stock*.

Price Quote

- Price quotes can be done under the Publix Direct Care Rx Program.
- Read the price quote instructions included on the Pharmacy page at *Pharmacy Operations > Quick References > Workflow > Price Quote.*

Move Rx

- Used to move an Rx from one profile to another if you determine that it was accidentally filled on the wrong patient profile (e.g., filled an Rx for Robert Smith Sr. on Robert Smith Jr.'s profile).
- Read the Move Rx instructions included on the Pharmacy page @ *Pharmacy Operations > Quick References > Patient and Prescriber Profiles > Move Rx.*

Prescription Transfers

- Information on transferring prescriptions in and transferring prescriptions out is stored on the Rx Details of the prescription in the Rx Profile. Your trainer will review this process with you.

Clinical Inquiry

- Used to review interactions between a drug and other drugs, disease states or allergies.
- To perform a clinical inquiry in the pharmacy system go to *Tools > Clinical Inquiry*.

Printing Medication Guides

- A medication guide will automatically print with certain prescriptions.
- To print a medication guide that does not automatically print in workflow, go to the Pharmacy page @ *References > Clinical Pharmacology© GOLD STANDARD INC, ALL RIGHTS RESERVED (Med Guides)*
- For information on how to use the site, review the reference guide at *References > Clinical Pharmacology© GOLD STANDARD INC, ALL RIGHTS RESERVED (Med Guides) > Clinical Pharmacology© Quick Reference Guide.*
- Once you have a printed medication guide, place the document inside the prescription bag.

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name Other Publix Pharmacy Programs and Services

Course Description a review of key programs and services

<u>Workload Balancing (WLB) and Central Pharmacy (CP)</u>

Both of these programs use the pharmacy system to

- efficiently complete work in our pharmacies improving ready-when-promised times
- help us manage labor by allocating work among multiple locations when possible
- help us manage high dollar inventory

Program	Description
WLB (FL, SC, TN) (AL – limited basis)	• Each store is in a Pharmacy Supervisor "squad" • Each store works their own prescriptions, as well as Data Entry and PV1 for other locations in their squad.

Central Pharmacy
(FL Only)
	The goal of Central Processing is to keep the prescription moving forward by resolving exceptions.
	• Central Processing Pharmacists and Technicians assigned to groups of stores work the highest priority prescriptions in the following queues
	   • Adjudication Exceptions
	   • Contact Manager
	   • Inbound Communication
	   • PV1
	• Central Clinical Pharmacists and Technicians process Medication Therapy Management (MTM) cases.

	The goal of Central Fill Phase 1 is to reduce inventory in the pharmacies by filling high-dollar items and select other items as determined beneficial. • Central Fill Pharmacists and Technicians perform Product Dispensing and Final Verification (PV2) prior to shipping prescriptions to the appropriate pharmacies. • Program is being rolled out.

Ways to make WLB and CP a success for your pharmacy

- must follow Reception Basics requirements
  - for example, hard copy must be clearly scanned with phone number and PDT
  - see Reception Basics sticker on image scanner for a reminder
  - review details on the Pharmacy page @ *Pharmacy Operations* > *Quick References* > *Workflow* > *Reception Basics*
- must set accurate PDT in the pharmacy system
- must use standard PDT coding
  - Prior Authorization –change Delivery method to **1-PA REQ**.
  - 5:55 – Leave for home store and always add a TX Note with an explanation
- graciously perform WLB work and receive assistance through WLB and CP

IVR and Web-refills

- Patients can request refills by calling the pharmacy or using www.publix.com.
- This only works when the patients preferred phone # is in the Phone field on Tab 1 of the patient profile (see Module 7).
- This is only preferred for non-maintenance medications.
- ERP (see below) is preferred for maintenance medications.

Enhanced Refill Process (ERP) – also called Auto-refill

- Setting up patients on ERP helps with maintenance medication compliance by automatically pushing prescription refills into workflow.
- Setting up a patient on ERP allows them to receive a call from us when a refill is ready instead of having to call in each refill through IVR, the web, or the pharmacy.
- ERP is an important inventory management tool – a refill drops into workflow a few days before the patient needs it, causing the system to
    - order inventory just-in-time for the fill or
    - push the prescription to Central Fill where it will be filled and sent to the store for patient pick up
- Signing up patients for ERP is easy – see detailed information on the Pharmacy page @ *Pharmacy Operations > Quick References > Enhanced Refill Process (AutoRefill)*

Sync Your Refills

- This program will sync up multiple maintenance medications for a patient to reduce the number of times they need to come to the pharmacy for pick-up. This is important for medication compliance and also workflow efficiency.
- The program is managed through PMAP system where a list of eligible patients is provided each day.
- Information about this program is on the pharmacy portal page @ *Concierge Services > Adherence and Compliance > Sync Your Refills*

Outbound Calling/Texting

- EnterpriseRx will generate an initial phone call or text message to the patient for prescriptions in the Ready status.
- EnterpriseRx will also generate a reminder phone call or text message to the patient if the prescription is not picked up.
- The Patient Messaging Access Portal (PMAP) is a website must be accessed daily to identify patients with incorrect or non-working phone numbers so that when the patient arrives to pick up the Rx, the phone information can be corrected.

Pharmacist I/New Hire Graduate Intern Training
Required Courses

LDM

Publix is partnered with LDM Group to produce real-time printed educational information that will empower our patients to improve their health. This information is delivered when a patient picks up their prescription. These messages include:

- CarePoints® targeted treatment messages, personalized and customized to your location and patients. The message includes information about the customer's prescription and relevant information about the condition being treated. These messages increase compliance and persistence, improving the patient's overall health outcomes. Messages include *Welcome to Therapy*, *Continuation of Therapy*, *Educational*, *Adjunctive Therapy* and messages for patients who are late refilling their medications.
- MedGuide™ drug information which prints seamlessly at the time of dispensing for required drugs, simplifying the task of maintenance and distribution.
- ValueAdd™ messages which will allow Publix to promote services, products, recipes and events unique to your location.

These print on goldenrod paper so the pharmacist will be prompted to provide the counseling when the patient comes in to pick up their prescription.

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Module P13:
Inventory Management

Module Description:
basics of inventory management, ordering, receiving, and stocking

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Course Name	Course Description	Type	Facilitator
Inventory Basics	basic inventory concepts, wholesaler programs, system tools and pharmacy processes to promote and drive management of inventory	ILT	Training Location RPh
Ordering, Receiving & Stocking	detail ordering receiving & stocking procedures	ILT	

Legend
ILT – Instructor-led training

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name Inventory Basics

Course Description basic inventory concepts, wholesaler programs, system tools and pharmacy processes to promote and drive management of inventory

<u>Overview</u>

- Inventory management is the responsibility of everyone in the pharmacy.
- It's important because
  - Inventory purchases are one of our largest costs of doing business and it must be managed well for Publix Pharmacy to remain profitable.
  - Mismanaged inventory can lead to profit losses in the form of shrink which is mainly made up of unsalable product – product that becomes outdated.
  - We have to have the right products at the right time to ensure that we can provide our customers with prescriptions when they need them.

<u>Inventory Management Basics</u>

There is information on several inventory management processes located in Ch.12 of the Pharmacy R&P Guide on the Pharmacy page of Publix Connection.

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Course Name Ordering, Receiving & Stocking

Course Description detail ordering receiving & stocking procedures

Overview

- The system automatically generates orders to be reviewed and modified, if necessary, prior to the order cut-off time.
- Receiving & stocking includes the process of verifying product received against the order; and then stocking the items on the shelves and updating inventory balances in the system by "receiving" the order.
- It's important that the inventory balance-on hand for each drug on the shelf is maintained accurately in our pharmacy system.

Ordering

- Ordering was covered to some degree in Module 9.
- In Module 7, Drug Profiles, basic knowledge of order parameters (Min/Max order points) was covered.
- Details of ordering will be covered by your trainer; however, the high level process for ordering prescription medications, includes:
  - 1st – reviewing the system generated order about 30-minutes before the pharmacy's cut-off time
  - 2nd – adding items to the order based on the items in the Fill on Arrival queue
  - 3rd – checking that the order was received by the supplier.
- Orders are accessed from the Tools menu under Inventory.

Receiving & Stocking

- Stocking was covered to some degree in Module 9.
- Details of receiving and stocking will be covered by your trainer; however, it's important to note that all product should be checked against the actual order to address discrepancies before applying the order to inventory balances in the system.
- Pharmacists ONLY can check in all controlled substances.
- Remember the First-In-First-Out stocking method – stock full bottles behind partials.

Important standard procedures

- Ordering, receiving, and stocking product is an important and very detailed process best learned working side-by-side with someone.
- Review in detail Chapter 11 of the R&P on the Pharmacy page @ *References > Pharmacy R&P Guide*.

Pharmacist I/New Hire Graduate Intern Training
Required Courses

Pharmacists: Recording Pharmacist I training Course Completion

Once you have completed the entire Pharmacist I training program, you must record completion in Learning. Please follow the steps below:

1. Log into Learning through Passport.
2. Locate the Pharmacist I training program on your To Do list and click **Start**.
3. Close the document that reads "Have you completed the Pharmacist I training program?"
4. Select **Yes** in Learning under the question "Have you completed this activity?"
5. The course will no longer be on your To Do list and will be listed on your Training Transcript with the completion date.

Graduate Interns: Recording New Hire Graduate Intern Training Course Completion

Once you have completed the entire New Hire Graduate Intern Training program, you must record completion in Learning. Please follow the steps below:

1. Log into Learning through Passport.
2. Locate the New Hire Graduate Intern Training program on your To Do list and click **Start**.
3. Close the document that reads "Have you completed the New Hire Graduate Intern Training program?"
4. Select **Yes** in Learning under the question "Have you completed this activity?"
5. The course will no longer be on your To Do list and will be listed on your Training Transcript with the completion date.